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MAPPING TRANSNATIONAL EDUCATION

A Report on the Emergence of Global Education Hubs

APRIL 2026

B K Bhuvesha | Wali Rahman Rahmani | Ichha Sharma
Mentors: Vidya Yeravdekar | Neeta Inamdar

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Executive Summary

This Report has been prepared as one of the outcomes of the Internationalization of Higher Education Conference 2026, organized by Symbiosis International (Deemed University) from 9 to 11 April 2026 on the theme Transnational Education in Transition: Practices, Policies and Perspectives.

The objectives of the Conference are:

- To unpack the idea of transnational education in theory and practice
- To analyze the implications of TNE on the individuals, higher education institutions and systems at large
- To explore the opportunities provided by global opening up for the HEIs
- To facilitate sharing of best practices in TNE
- To examine the challenges faced by local or national HEIs in coping with the competition posed by these education hubs

In this Report, an attempt is made to capture developments related to TNE, provide conceptual clarity, albeit briefly, and map the emergence of different education hubs that have come to redefine transnational education in different parts of the world.

This Report was imagined as a document to support discussions in this regard by providing the much-needed data regarding transnational education. The recent developments of foreign university campuses being established in India, and the development of higher education hubs particularly in GIFT City and EduCity in Navi Mumbai, prompted the team to focus more on higher education hubs than all international branch campuses (IBCs) as such. Therefore, six countries such as Dubai, Malaysia, Mauritius, Qatar, Singapore and India were taken up for closer study of hubs established within them. It is to be noted that Dubai and India have two hubs each and both have been studied closely. As the Report is being prepared in India, there is relatively more focus on the education hubs in India. The Report therefore, also has fee and other financial data represented in terms of INR for the convenience of Indian readers. While converting this data, the monthly average of exchange rates has been used. Data was collected from multiple sources, collated and presented for ease of access, followed by key insights derived from the data.

As the objective of this Report is to help decision makers in universities, government agencies and business houses, brevity has been chosen over elaboration wherever possible. Details of the fee charged by different universities in their branch campuses is presented in a separate annexure to avoid adding to the bulk of the Report. This annexure along with the Report is available on the website of the Symbiosis Centre for Higher Education Research and Policy Advocacy (SCHERPA).

Each section has a table at the end listing out the key observations in that particular hub. Apart from that, a table with a list of key observations about the entire phenomenon are presented at the end of this Report to help readers with a quick analysis of the contents presented in the document. It should also be noted that only higher education hubs are mapped in this Report and that international branch campuses outside of hubs are not covered except for India.

The Report also incorporates a brief comparative analysis of regulatory frameworks governing TNE, particularly examining evolving policy approaches in India, to highlight enabling conditions and constraints for entry of foreign institutions. Additionally, the Report situates TNE within the broader context of geopolitical shifts and global uncertainties underscoring their implication for the sustainability and strategic positioning of emerging and established education hubs.

We, as a team, hope you will find time to read through this Report, and share your observations and insights with us by writing to us at scherpa@siu.edu.in.

Authors

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Dr Neeta Inamdar is Dean of the Faculty of Education, Jean Monnet Chair, and a leading expert in higher education. She founded the Manipal Centre for European Studies, transforming it into India's first Jean Monnet Centre of Excellence. With over a decade of experience, she has led major international projects, secured significant grants, and contributed extensively to higher education research and policy. She has three edited volumes in higher education to her credit apart from several research papers. She currently heads SCHERPA strengthening higher education research and policy in India.

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List of Abbreviations

AACSB	Association to Advance Collegiate Schools of Business
ABET	Accreditation Board for Engineering and Technology
AMBS	Association of MBAs
ASEAN	Association of Southeast Asian Nations
BEM	Board of Engineers Malaysia
C-BERT	Cross-Border Education Research Team
CMU-Q	Carnegie Mellon University in Qatar
D33	Dubai Economic Agenda
DIAC	Dubai International Academic City
DKP	Dubai Knowledge Park
D-SETARA	Sistem Penarafan Berasaskan Disiplin Institusi Pengajian Tinggi Malaysia (Discipline-Based Rating System for Higher Education Institutions in Malaysia)
E33	Education 33 / Education Strategy 2033
EDB	Economic Development Board
EISB	Education@Iskandar Sdn Bhd
EMGS	Education Malaysia Global Services
EPP	Entry Point Project
EQUISE	European Quality Improvement System
ERF	Enhanced Registration Framework
ETP	Economic Transformation Program
FDI	Foreign Direct Investment
GCC	Gulf Cooperation Council
GCED	Global Citizenship Education
GIFT City	Gujarat International Financial Tec- City
GMC	General Medical Council, United Kingdom
GU-Q	Georgetown University in Qatar
HBKU	Hamad Bin Khalifa University
HEC	École des Hautes Études Commerciales (HEC Paris)
HLC	Higher Learning Commission
IBC	International Branch Campus
IFSC	International Financial Services Centre

IFSCA	International Financial Services Centre Authority
IHE	Internationalization of Higher Education
IIB	Iskandar Investment Berhad
IPPM	International Program and Provider Mobility
IRDA	Iskandar Regional Development Authority
JPA	Jabatan Perkhidmatan Awam (Public Service Department), Malaysia
KHDA	Knowledge and Human Development Authority
LCME	Liaison Committee on Medical Education
MCI	Medical Council of India
MIDA	Malaysian Investment Development Authority
MMC	Malaysian Medical Council
MoE	Ministry of Education
MOEHE	Ministry of Education and Higher Education, Qatar
MOEHE	Ministry of Education and Higher Education, Qatar
MOHE	Ministry of Higher Education, Malaysia
MQA	Malaysian Qualifications Agency
MQF	Malaysian Qualifications Framework (Kerangka Kelayakan Malaysia)
MSCHE	Middle States Commission on Higher Education
MTI	Ministry of Trade and Industry
NASAD	National Association of Schools of Art and Design
NEP	National Education Policy
NKEA	National Key Economic Area
NUMed	Newcastle University Medicine Malaysia
NU-Q	Northwestern University in Qatar
NVAO	Accreditation Organisation of the Netherlands and Flanders
PEMANDU	Performance Management and Delivery Unit (Unit Pengurusan Prestasi dan Pelaksanaan)
PHEIA	Private Higher Educational Institutions Act 1996
PSPTN	Pelan Strategik Pengajian Tinggi Negara (National Higher Education Strategic Plan)
PTPTN	Perbadanan Tabung Pendidikan Tinggi Nasional (National Higher Education Fund Corporation)
QAA	Quality Assurance Agency for Higher Education, United Kingdom

QAAET	Quality Assurance and Accreditation System for Education and Training
QBRI	Qatar Biomedical Research Institute
QCRI	Qatar Computing Research Institute
QEERI	Qatar Environment and Energy Research Institute
QF	Qatar Foundation for Education, Science and Community Development
QNRF	Qatar National Research Fund
QNV 2030	Qatar National Vision 2030
QPHI	Qatar Public Health Institute
QS	Quacquarelli Symonds
QSTP	Qatar Science and Technology Park
SDG	Sustainable Development Goal
SEC	Supreme Education Council, Qatar
SETARA	Sistem Penarafan Institusi Pengajian Tinggi Malaysia (National Higher Education Institutional Rating System)
SLMC	Sri Lanka Medical Council
SLMC	Sri Lanka Medical Council
SSG	SkillsFuture Singapore
TAMUQ	Texas A&M University at Qatar
TEC	Tertiary Education Commission
TNE	Transnational Education
UAE	United Arab Emirates
UGC	University Grants Commission
UoRM	University of Reading Malaysia
UQAIB	University Quality Assurance International Board
USMC	University of Southampton Malaysia Campus
USMLE	United States Medical Licensing Examination
USMLE	United States Medical Licensing Examination
UUCA	Universities and University Colleges Act 1971
VCUarts	Qatar Virginia Commonwealth University School of the Arts Qatar
WASC	Western Association of Schools and Colleges
WCM-Q	Weill Cornell Medicine-Qatar
WDOMS	World Directory of Medical Schools

1. Global Higher Education Ecology

Higher education is now being transformed by forces that are at once expansive and unpredictable. Worldwide higher education enrollment, as per UNESCO, has reached a record 264 million, with demand continuing to grow, provision becoming more diversified, and international engagement increasingly taking forms beyond the movement of students alone. In this wider landscape, transnational education has acquired a more visible and strategic role, as governments and institutions seek ways to widen access, strengthen talent pipelines, build knowledge economies, and position themselves within global academic networks.

At the same time, this expansion is evolving in a fractured world marked by war, geopolitical rivalry, regulatory tightening, and uneven mobility regimes, all of which place new pressure on cross-border educational arrangements. The contemporary significance of transnational education, therefore, lies not only in its scale or spread, but in the fact that it now sits at the crossroads of higher education policy and geopolitical uncertainty.

The expansion of transnational education, however, is not simply grounded in opportunity, mobility, and institutional innovation. It also raises deeper questions about regulation, affordability, asymmetries in knowledge flows, and the extent to which new educational infrastructures widen access or reproduces existing hierarchies.

It is within this wider context that the present Report becomes especially relevant to India. For a long time, India's international engagement in higher education remained largely associated with outbound mobility and external academic collaboration. Recent developments, however, suggest a pivotal shift. With the emergence of dedicated ecosystems such as GIFT City and the International EduCity in Navi Mumbai, together with the regulatory opening created through recent policy measures, India is beginning to move from participation in global higher education flows to the institutional hosting of foreign providers within its own institutional landscape. This change gives transnational education a more immediate policy relevance within India, not merely as an external phenomenon to be observed, but as a developing part of the country's own higher education future.

Against this background, the Report adopts a deliberately focused lens. It does not seek to cover the full global landscape of transnational education, nor does it treat international branch campuses simply as isolated institutional entities. Instead, it studies higher education hubs as organized policy and regulatory formations through which transnational education is being structured, governed, and made materially visible. The discussion that follows therefore begins with a brief conceptual

section, moves to the study of selected education hubs, turns to the Indian case in greater detail, and concludes by drawing together wider comparative observations and recommendations. In this sense, the Report is intended not as a comprehensive account of all forms of cross-border provisions, but as a focused study of how hub-based models are building the contemporary course of transnational education.

2. Conceptual Understanding of Cross-Border Higher Education

Higher education systems have extended their activities beyond national boundaries and now operate within interconnected global knowledge networks (Altbach et al., 2009). This expansion of academic activities across national boundaries encompasses movement of students, academic programs, institutions and educational services across national jurisdictions, and is collectively termed as cross-border education (Knight, 2008). This has evolved alongside globalization, advances in digital technologies, and growing international demand for tertiary education. What started with mobility of students slowly shifted to mobility of programs and institutions with the changing demands within the educational ecology (Bhat & Inamdar, 2025).

Despite rapid expansion, the terminology used to describe cross-border higher education remains conceptually diverse and at times ambiguous. Several overlapping terms appear in the literature, including International Higher Education, Internationalization of Higher Education (IHE), Transnational Education (TNE), and a variety of institutional arrangements such as dual degrees, joint programs, and cross-border program delivery (Wilkins, 2018).

These terms are often used interchangeably in policy discussions and institutional strategies, even though they refer to different dimensions of global higher education activity. Some concepts describe broad system-level transformations, while others refer to specific institutional arrangements through which academic programs are delivered across borders.

Clarifying these distinctions is therefore important for analytical precision. Two concepts are particularly central to understanding cross-border provision: IHE and TNE.

2.1 Internationalization of Higher Education (IHE)

The most accepted, discussed and cited definitions of Internationalization of Higher Education provided by Knight refers to it as the integration of international, intercultural, and global dimensions into the purpose, functions (teaching, research, service), and delivery of post-secondary education (Knight, 2004). De Wit later refined this definition by emphasizing that

internationalization is an intentional process aimed at improving the quality of education and research for all students and staff, while also contributing meaningfully to society (De Wit, 2015). This refinement is important because it moves the concept beyond mobility and branding, and places quality and social purpose at the center of the discussion.

Universities pursue internationalization through a wide range of activities, including student mobility programs, international research collaborations, curriculum internationalization, and institutional partnerships. The internationalization also hints that it is matter of *process* and also that the agency lies with the institutions that drive it. The term international higher education is a description of the phenomenon as it stands or the outcome of the process initiated by the universities. However, in today's world, with the increased involvement of the state, the agency has seemingly shifted from universities to states. Though this is still being debated, it is important to see the processes and the outcomes of IHE as distinct.

Internationalization, therefore, operates primarily as an institutional strategy through which universities engage with global academic environments. It reflects how institutions respond to globalization by incorporating international perspectives into teaching, research, and governance.

Importantly, internationalization does not necessarily require the relocation of educational provision across national borders. Many internationalization activities are initiated within domestic campuses through international partnerships, internationalized curricula, international student and faculty recruitment and collaborative research.

2.2 Transnational Education (TNE)

Transnational Education (TNE) refers to higher education provision in which the learner is located in a country different from that of the awarding institution (Knight, 2016). Unlike general internationalization strategies, TNE involves the physical or organizational relocation of academic provision across borders. Universities may deliver programs through franchise arrangements, validation partnerships, joint degrees, distance education, or the establishment of international branch campuses (IBCs).

TNE raises important governance and quality assurance considerations, as academic provision, awarding authority, and regulatory oversight are distributed across multiple jurisdictions. Understanding TNE, therefore, requires attention not only to the mobility of programs and institutions but also to how authority, regulation, and accountability operate across national higher education systems.

2.3 IHE vs TNE

Both IHE and TNE reveal that while both are integral to the global engagement of higher education, they differ in scope, focus, and implementation. Below Table 1 provides a comparative overview of both, highlighting how they differ across key dimensions such as scope, modes of operation, focus, and governance. It shows that while IHE represents a broad policy framework encompassing global academic engagement, through student mobility, research collaboration, and internationalized curricula, TNE functions as a more specific institutional mechanism that enables the cross-border delivery of education.

Dimension	Internationalization of Higher Education (IHE)	Transnational Education (TNE)
Conceptual scope	Broader policy context within which universities engage globally	An institutional mechanism through which higher education crosses national borders (provider mobility) in a focused policy context
Mode of Operation	Occurs through student mobility, research and institutional collaborations initiated by universities	Occurs through delivery models such as franchise agreements, joint degrees, distance education and international branch campuses initiated by universities but facilitated by the state
Primary focus	Focuses on the mobility of students, faculty members, research and academic collaborations	Focuses on the mobility of programs and institutions across national borders
Location of learning	Often takes place at the host institution outside of the country of the learner	Often takes place in the country of learner offered by an institution from outside crossing the border
Institutional role	Universities integrate international perspectives in teaching, research, and governance	Universities extend their academic programs and

		institutional presence across borders
Governance and Regulations	Managed within institutional and national frameworks of higher education	Requires coordination amongst the awarding institutions, quality assurance and regulatory systems across countries
Examples	International student mobility, global research collaboration, and internationalized curricula	Franchise programs, joint degrees, dual degrees, international branch campuses

Table 1: Distinguishing Internationalization of Higher Education and Transnational Education

2.4 Modes of TNE: Program and Provider Mobility

Transnational education expresses itself in different forms. The literature commonly distinguishes between two key forms: program mobility and provider mobility (Knight, 2008; Lane & Kinser, 2013).

Program mobility refers to arrangements in which academic programs cross national borders physically (franchise programs) or virtually, while the institution itself remains located in its home country. Provider mobility, by contrast, involves the physical establishment of institutional operations within the host country.

The International Program and Provider Mobility (IPPM) framework further refines this distinction by categorizing cross-border provision according to institutional presence and partnership structure (Knight & Liu, 2019).

The following Table 2 classifies major modes of transnational education according to the degree of institutional presence in the host country, the level of regulatory exposure, and the extent of institutional commitment required from the home institution. Rather than treating all forms of cross-border provision as equivalent, it distinguishes them along a continuum ranging from relatively low-commitment and low-exposure models to those involving deeper organizational embedding in the host system.

Mobility Mode	Institutional Presence	Regulatory Exposure	Institutional Commitment (home institution)	Example
Distance / Online Provision	None	Low	Low	Cross-border online degrees
Franchise Programs	Partner institution	Moderate	Moderate	UK degrees delivered through partner institutions in Asia
Articulation / Twinning	Partial	Moderate	Moderate	2+2 India–US university pathways
International Branch Campuses	Full foreign campus	High	High	Carnegie Mellon University Qatar; SUNY Korea; Deakin University GIFT IFSC; S P Jain in Australia

Table 2: Classification of Major Modes of Transnational Education

The primary distinction among these models concerns the degree of institutional embeddedness rather than delivery format. International branch campuses exemplify the most institutionally embedded forms of provider mobility (Kinser & Lane, 2016).

2.5 Why Focus on International Branch Campuses

Transnational education encompasses multiple forms of program and provider mobility. However, this Report foregrounds IBCs within hubs because they represent one of the most institutionally

embedded forms of TNE. With the establishment of physical campuses in the host countries, IBCs involve the highest degree of institutional presence, regulatory exposure, and long-term strategic commitment in comparison to other TNE models.

International branch campuses are commonly defined as campuses established by a foreign higher education institution that deliver entire academics on-site and award degrees from the parent institution (Garrett et al., 2016). This definition, widely used in global datasets maintained by the Cross-Border Education Research Team (C-BERT) and the Observatory on Borderless Higher Education, distinguishes branch campuses from partnership-based forms of transnational education.

IBCs are analytically crucial because they magnify the institutional burdens of provider mobility. Establishing a foreign campus requires universities to invest in physical infrastructure, recruit faculty, comply with host-country regulations, and manage complex cross-border governance arrangements. These campuses, therefore, make visible the political, financial, and reputational risks associated with international expansion (Healey, 2015; Kinser & Lane, 2016).

Examples of international branch campuses include Carnegie Mellon University Qatar, , SUNY Korea, George Mason University Korea, Deakin University and the University of Wollongong at the GIFT International Financial Services Centre (IFSC) and IIT Madras in Zanzibar. It is to be noted that these are just a few examples out of a lot of such experiments in progress across the world.

It is important to recognize that IBCs are not treated as synonymous with transnational education. They are analytically privileged here because they reveal the institutional complexity and governance challenges inherent in cross-border higher education provision (Lane et al., 2024). The expansion of IBCs is closely linked to the broader goals of countries to position themselves as global centres of higher education through the development of education hubs.

3. Education Hubs: Concept and Rationales

Education hubs refer to geographically concentrated ecosystems of universities, research institutions, and related educational services designed to attract international students, institutions, and investment. Unlike organically developed university clusters, education hubs are typically deliberate state strategies aimed at positioning countries as regional centres for higher education, research, and innovation. Governments pursue hub strategies by encouraging the establishment

of foreign universities, international branch campuses, and collaborative research institutions within designated zones (Fan et al., 2022).

Knight categorizes education into three types based on priorities and focuses: student hubs, which prioritize attracting international students; talent hubs, which focus on developing skilled human capital; and knowledge and innovation hubs, which integrate universities into national research and innovation ecosystems (Knight, 2011).

Hub strategies rarely pursue a single policy objective. Instead, they reflect overlapping economic, educational, socio-cultural, political, and geopolitical motivations.

Governments pursue hub strategies not only to expand higher education capacity but also to strengthen economic competitiveness, enhance national prestige, and project influence within regional knowledge systems (Lee, 2015a, 2015b).

3.1 Economic and Development Rationale

Economic considerations are among the strongest drivers of education hub development. Governments increasingly view higher education as a central component of knowledge-based economic development. The prominence gained aligns with the shift from factor-driven growth to knowledge-driven growth. It is also about the preference for innovation-led growth over consumption-led growth.

Economic rationales operate at two levels. In the short term, international students generate direct economic benefits through tuition payments and local spending. In the longer term, hub strategies aim to strengthen human capital formation, support innovation systems, and position countries within global knowledge economies (Zhang et al., 2025).

Scholars have linked these developments to broader processes of academic capitalism, in which universities become more closely integrated with market-oriented economic structures (Slaughter & Rhoades, 2004). Education hubs, therefore, function not only as educational projects but also as instruments of economic development policy (Mok, 2016).

Though IHE (discussed above) also generates higher remittances despite the significant foreign exchange outflow, brain-drain weakens domestic growth capacity. Growth prospects that are expected through enhanced skills and global competencies associated with IHE depend largely on return migration and reintegration. Another major problem with IHE is its exclusivity. It is accessible to a very small percentage of student population globally.

In contrast to this, conceptually at least, TNE democratizes access to international education by making the institutions mobile and bringing the education provider to the seekers. It is more directly connected with the logic of sustainable growth as it builds human capital locally and strengthens local labour market. It not only reduces outward mobility costs and talent loss but builds long-term productivity and innovation capacity by feeding into the domestic skill ecosystem aligned with domestic development priorities.

3.2 Educational Rationale

The most immediate rationale for hub development lies in the capacity expansion under conditions of demand pressure for quality education. At the same time, hub strategies are often expected to enhance program diversity and academic exposure. For instance, in India's case, the internationalization trajectory has historically been outbound-heavy, and any hub ambition must be read against this imbalance. The educational logic, therefore, is not simply expansion, but selective supplementation of domestic capacity in ways that may reduce external dependence while broadening access to international provision within the country (Yeravdekar & Tiwari, 2014).

By attracting foreign universities and facilitating cross-border partnerships, education hubs expose domestic students and institutions to international academic practices. These initiatives may also contribute to the internationalization of domestic learning environments for the non-mobile majority, a goal commonly described as Internationalization at Home (Beelen & Jones, 2015).

3.3 Socio-cultural Rationale

Education hubs can also contribute to the internationalization of domestic academic environments by facilitating interaction between international students, faculty, and institutions. Scholars describe this process as part of the broader concept of Internationalization at Home, through which international perspectives are integrated into local academic contexts even when students do not study abroad (De Wit, 2011).

The presence of international institutions and diverse student populations can encourage intercultural exchange, promote global awareness among domestic students, and strengthen international academic collaboration. Such developments contribute to the broader cultural dimension of internationalization, which emphasizes the role of higher education in fostering intercultural competence and global engagement within increasingly interconnected societies. It is also connected to the global citizenship education (GCED) which UNESCO has upheld as an outcome of the international exposure in education through SDG 4.7.

3.4 Political and Symbolic Rationale

Education hubs also serve political and symbolic purposes. Governments frequently use higher education initiatives to signal national modernization, policy ambition, and global engagement (Lee, 2015a).

Higher education reforms are, therefore, embedded within global hierarchies of aspiration and legitimacy rather than as purely technical policy decisions. Hub development, in this sense, is not just about attracting institutions but about aligning national systems with globally recognized forms of academic prestige (Rizvi, 2012, 2023).

In this sense, hub strategies allow states to convert higher education into symbolic capital by associating national systems with globally prestigious institutions (Bourdieu, 1986). Education hubs, therefore, operate not only as educational infrastructures but also as instruments of symbolic state power (Xiaohong, 2019).

3.5 Geopolitical and Soft-Power Rationale

At the geopolitical level, education hubs function as instruments of soft power, regional influence, and talent attraction. By hosting international universities and attracting globally mobile students, states can shape regional talent flows and strengthen diplomatic and academic networks (Lee, 2015b).

Unlike political and symbolic rationales, which focus on prestige and status signaling, geopolitical rationales emphasize longer-term influence over regional knowledge systems and cross-border intellectual networks (Robertson & Wu, 2023). Higher education mobility increasingly intersects with international diplomacy, a process sometimes described as knowledge diplomacy, in which academic collaboration contributes to broader diplomatic relationships among states (Knight, 2023).

Meanwhile, Varghese complements this by grounding the discussion in mobility patterns and policy responses, emphasizing that cross-border education is closely linked to how countries manage outbound and inbound student flows (Varghese, 2008).

Though a lot could be discussed in the conceptual part here, the team working on this Report decided to limit academic exposition and focus more on providing facts around hubs for easy reference. The objective of the Report is mainly to study select higher education hubs closely based on data that is available, and present insights about each of the hubs and then present key observations about the phenomenon itself.

In the next part of this Report, we attempt to provide a comparative study of six countries hosting education hubs – Dubai, Malaysia, Mauritius, Qatar, Singapore and India. One may observe that the hubs being developed in India get a larger share of attention in the Report for their evolving significance not only for India but for the global higher education landscape.

Figure 1: Geographical distribution and foundational timeline of the selected education hubs

The selection of hubs: The selected hubs were chosen first for their regional relevance. Most of them are located within Asia with the exception of Mauritius from the east of Africa, a region that represents over half of global tertiary enrollment and has been an important site for state-led education-hub development. They were also selected because, taken together, they capture meaningful variation in the age, governance structure, and developmental stage of higher education hubs. Three of the cases represent earlier, and more established hub trajectories. Qatar's hub model can be traced to the creation of Qatar Foundation in 1995, Singapore's to the launch of the Global Schoolhouse initiative in 2002, and Dubai's to the establishment of Dubai Knowledge Park in 2003, from which its later higher education clusters evolved. Including these earlier cases is analytically useful because they provide longer policy timelines, more mature institutional ecosystems, and clearer evidence of how hub strategies develop over time.

The cases were also selected because they reflect different ownership and organizational logics. Qatar represents a strongly state-backed and not-for-profit model anchored in Qatar Foundation. Malaysia, particularly through EduCity Iskandar, represents a shared government-linked development structure. Mauritius, meanwhile, reflects a more mixed configuration in which state strategy has been combined with international providers, private participation, and local partnerships. This variation matters because hub outcomes are shaped not only by policy ambition, but also by who owns, finances, and operationally drives the project. Mauritius and India are especially important in this regard because they allow the Report to examine hub development as an evolving process rather than as a settled model. Their inclusion strengthens the comparative design by placing mature hub trajectories alongside cases that are still being assembled, tested, and institutionally negotiated.

4. Limitations

The Report is a policy-oriented comparative analysis based primarily on publicly available data, rather than a primary-data study. Its purpose is to map the structural, and financial architectures of the selected hubs in a form that is useful to policy practitioners and institutional leaders.

The absence of China is an important limitation, but it also reflects a deliberate boundary in the Report's comparative design. The Report focuses on education hubs as territorially identifiable policy formations rather than on transnational education systems in their entirety.

The principal unit of analysis is therefore not the individual international branch campus, nor transnational education activity in its entirety, but the hub as a territorially bounded policy and regulatory formation. The Report does not attempt to cover the full range of transnational education modes, including franchise arrangements, twinning programs, online delivery, and articulation partnerships. Its conclusions should therefore not be generalized to transnational education as a whole.

China is highly relevant to the wider Asian TNE landscape, particularly through its Chinese-Foreign Cooperation in Running Schools framework, which encompasses a very large number of joint institutes and joint programs across diverse institutional and geographic settings. However, this architecture is more dispersed and system-wide than the hub models examined in the present study, and does not map neatly onto the bounded hub jurisdictions used for comparison here. Its inclusion would therefore require a different comparative logic, one centered on national TNE systems rather than education hubs.

A further limitation concerns comparability of scale and level of analysis. The cases examined in this Report do not represent the same institutional form. Some are purpose-built education zones or cities, while others are national or city-state strategies for higher education internationalization. The comparison is therefore analytically useful, but not perfectly symmetrical.

Data comparability across hubs is also constrained by the uneven quality and transparency of publicly available information. Fee structures, enrollment figures, provider lists, and state investment data are reported differently across jurisdictions, and in some cases are only partially available. Cross-hub numerical comparisons should therefore be treated as indicative rather than definitive. The Report also presents a time-bound snapshot of hub development as available in early 2026. This is particularly relevant in emerging cases, where regulatory pathways, provider participation, and project implementation remain in flux. Additionally, because the Report relies primarily on structural and policy-level indicators, it is better able to analyze hub design than to evaluate lived educational outcomes. Questions of student access, social inclusion, academic quality, graduate trajectories, and long-term institutional impact would require dedicated empirical investigation beyond the scope of the present study.

5. Challenges

At the time of writing this Report, transnational education is operating in an increasingly fractured geopolitical environment. The war in Ukraine, escalating crisis in West Asia involving the United States, Israel, and Iran disrupt educational continuity and wider knowledge systems, while conflict in Gaza has devastated educational infrastructure and deepened uncertainty across the region. Meanwhile, in South Asia, the most acute challenge is visible in Afghanistan, where women have been banned from universities since December 2022, and girls and women remain excluded from education beyond the primary level. Taken together, these developments expose a central vulnerability in TNE that depends on political stability, regulatory predictability, and cross-border trust. The crises also increase the operational burdens associated with mobility, compliance, partnership management, and long-term planning.

For education hubs and IBCs, the challenge is therefore not only economic or regulatory, but geopolitical. Institutions operating across borders must now helm sanction environments, security scrutiny, reputational risk, and the possibility that academic partnerships may become entangled in wider strategic conflict. The 2024 decision to close Texas A&M University at Qatar by 2028 is instructive in this regard: even long-established branch-campus arrangements remain contingent

and can be reconsidered when the surrounding political environment becomes more unstable. Yet these pressures also clarify the continuing importance of cross-border higher education.

If designed and governed carefully, education hubs can still function as structured spaces for dialogue, academic contact, and sustained exchange across divided contexts. This need not be romanticized. Higher education is not a substitute for diplomacy, nor do branch campuses automatically produce peacebuilding outcomes. But both UNESCO's peace-education framework, and higher education research in conflict-affected settings, support the more modest and defensible claim that education can contribute to dialogue, cooperation, and social stability. In that sense, the value of TNE in a fractured world lies not only in talent development or market expansion, but also in preserving channels of intellectual exchange when wider political relations are under strain.

6. Comparative Analysis of Education Hubs

Despite sharing common structural features, education hubs differ significantly in their institutional design, regulatory frameworks, and strategic objectives. Some hubs emphasize attracting international students and foreign campuses, while others prioritize domestic capacity building, research development, or workforce training. These differences reflect varying national approaches to managing higher education policy, economic development strategy, and international provider mobility.

6.1 United Arab Emirates (UAE)

Over the last two decades, the United Arab Emirates (UAE) and Dubai in particular has become one of the most prominent global sites for transnational higher education and international branch campuses. The UAE is consistently identified as one of the largest hosts of IBCs worldwide, with Dubai and Abu Dhabi acting as key hubs (Bridi, 2020; Hanada, 2013; Wilkins, 2010). Dubai has deliberately positioned itself as a market-oriented higher education hub by

clustering foreign universities in free zones such as Dubai International Academic City (DIAC) and Dubai Knowledge Park (DKP). Dubai's higher education hub is embedded in broader national and Emirate-level economic diversification and knowledge economy strategies. The UAE's National Strategy for Higher Education 2030 frames higher education as a mechanism to build human capital, and innovation and global competitiveness. Within this frame, internationalization

and TNE are instruments for attracting talent, foreign direct investment (FDI) and global institutional brands.

Location: Dubai, United Arab Emirates (UAE)

Year of establishment: Dubai Knowledge Park (DKP) 2003; Dubai International Academic City (DIAC) 2007

Names of the governing/regulatory bodies: UAE Ministry of Education (MoE); Commission for Academic Accreditation (CAA); Knowledge and Human Development Authority (KHDA); University Quality Assurance International Board (UQAIB); TECOM Group (DIAC/DKP cluster operator)

No of IBCs: 37; Academic City - 12, Dubai Knowledge Park - 12, DIFC - 6, and 7 across other free-zone locations

Countries establishing IBCs: Australia, China, France, Germany, India, Italy, Lebanon, Pakistan, Russia, Saudi Arabia, the United Kingdom, and the United States

i) Policy context

Policy: National Higher Education Strategy 2030 (2017); Dubai Economic Agenda (D33) (2023); Education Strategy 2033/Education 33 (E33) (2024) (Dubai Media Office, 2023, 2023; Executive Council of Dubai, 2011, p. 2024; MoE, 2017).

The Regulatory body: UAE Ministry of Education; Government of Dubai; The Executive Council of Dubai/KHDA

ii) Objectives of establishing the Hub

- To position Dubai as a global higher-education destination
- To attract international students and high-ranking foreign providers
- To support the knowledge economy and raise the international-student share in higher education to 50 per cent by 2033

iii) State Support

The support by the state in Dubai is substantial, offering 100 per cent foreign ownership, zero per cent personal income tax and zero per cent customs duties, land/facility provisioning, streamlined licensing, and visa/residency facilitation. KHDA's framework allows a foreign university to establish a branch campus exclusively within designated Dubai free zones under its jurisdiction, while institutions outside free zones must be licensed and accredited through the federal CAA. This indicates that the state support begins with a specialized regulatory channel designed specifically to enable the entry of branch campuses.

iv) Requirements

- IBCs must obtain a KHDA Educational Services Permit and hold valid institutional accreditation
- The IBCs must be in the top 500 in the world university rankings or top 100 by/equivalent recognized accreditation
- The IBCs should show alignment with Dubai labour-market priorities and D33

v) Quality Assessment

Dubai has two routes for quality assurance, such as international quality assurance for branch campuses through KHDA academic authorization/UQAIB-type validation and local quality Assurance through CAA/MoE licensure and accreditation.

vi) Recognition of qualification

Under Executive Council Resolution No. 21 of 2011, KHDA certifies academic qualifications issued by higher-education institutions in Dubai's free zones for employment and other purposes in Dubai. Institutions operating through the local quality-assurance route are linked to MoE/CAA licensure and accreditation.

vii) IBCs in Dubai

Sl no	Name of the IBC	Country of Origin
1	American University of Beirut	Lebanon
2	Amity University Dubai	India
3	Birla Institute of Technology and Science Pilani (BITS Pilani) Dubai Campus	India
4	Curtin University Dubai	Australia

5	De Montfort University Dubai	UK
6	EM Normandie Business School	France
7	ESCP Business School	France
8	ESMOD French Fashion Institute	France
9	Georgetown University Dubai	US
10	Heriot-Watt University Dubai	UK
11	Hult International Business School	US
12	Indian Institute of Management Ahmedabad	India
13	Institute of Management Technology - Dubai	India
14	Istituto Marangoni Dubai	Italy
15	London Business School	UK
16	LUISS Guido Carli (DWTCA Branch)	Italy
17	Manipal Academy of Higher Education	India
18	Middlesex University Dubai	UK
19	Moscow University for Industry and Finance (Synergy)	Russia
20	Murdoch University, Dubai	Australia
21	Neohorizon School of Business	China
22	PHBS Dubai	China
23	Plekhanov Russian University of Economics - Dubai	Russia
23	Plekhanov Russian University of Economics - Dubai	Russia
24	Rochester Institute of Technology - Dubai	US
25	S P Jain School of Global Management	India
26	SAE University College	Australia
27	Saint Joseph University Dubai	Lebanon
28	Shaheed Zulfikar Ali Bhutto Institute of Science and Technology	Pakistan

29	SKEMA Business School	France
30	Strathclyde Business School UAE	UK
31	Symbiosis International University	India
32	The University of Manchester Worldwide	UK
33	University of Birmingham Dubai	UK
34	University of Bradford	UK
35	University of Europe for Applied Sciences	Germany
36	University of Wollongong in Dubai	Australia
37	University Paris II Panthéon-Assas	France

Table 3: IBCs in Dubai and their countries of origin

Scan this QR code to access a comprehensive PDF detailing the programs offered by international branch campuses within the above-selected hubs, including fee structures and levels of study.

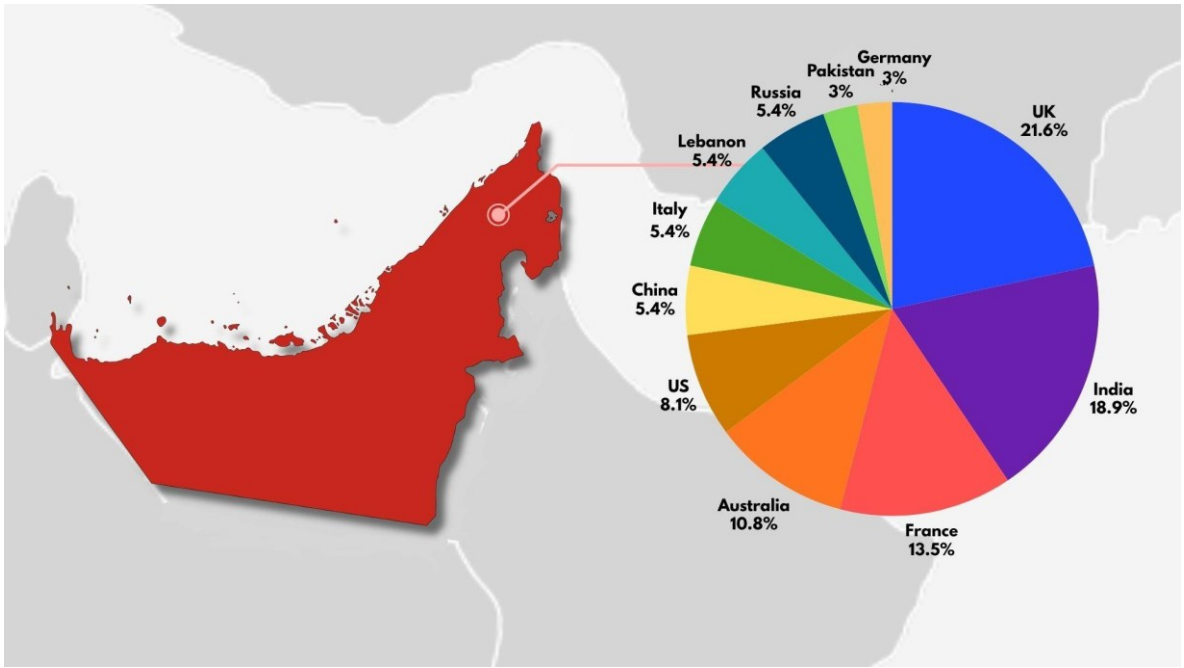

Figure 2: Distribution of International Branch Campuses in Dubai by Country of Origin

viii) IBCs established beyond hubs in Dubai

Beyond the dense concentration of foreign providers in Dubai's education free zones and specialist districts, the wider UAE hosts a smaller but still relevant second layer of IBC activity in Abu Dhabi and Ras Al Khaimah. Abu Dhabi's profile is more selective and prestige oriented, represented by institutions such as New York University Abu Dhabi, Sorbonne University Abu Dhabi, and INSEAD Abu Dhabi, while Ras Al Khaimah has accommodated a narrower set of branch style operations under alternative regulatory arrangements. Yet the overall pattern remains decisively Dubai centric. KHDA reports that Dubai alone currently has 41 licensed international higher education providers, 37 of them international branch campuses.

ix) Observations

A substantial body of critical scholarship highlights tensions between Dubai's promotional narrative as a 'world-class hub' and empirical evidence on quality, sustainability and developmental contribution.

Oversupply and segmentation

The rapid growth of private and IBC provision in the region has created a highly competitive market where supply exceeds domestic demand, driving aggressive regional recruitment contributing to a segmented landscape in which well-resourced institutions coexist with smaller, more precarious providers.

Teaching heavy, research-light profile

Many Dubai-based IBCs are primarily teaching institutions with limited research capability. The focus on revenue-generating programs, especially at the undergraduate and taught-postgraduate levels, sits uneasily with the rhetoric of innovation and research-driven development.

Quality and student experience gaps

UQAIB's validation model has often been presented as an innovative regulatory approach to cross-border higher education. However, the literature does not suggest uniform quality outcomes across IBCs. While some branch campuses appear to offer facilities and teaching standards comparable to those of their home institutions, others seem to operate with more limited resources. Recent studies on student satisfaction and service quality in Gulf-based IBCs report mixed perceptions, especially regarding career support, value for money, and confidence in degree outcomes.

Recognition and equity issues

Differences between CAA-accredited and UQAIB-validated institutions mean that not all Dubai degrees have the same recognition profile, especially for public-sector employment and long-term residence routes. Students who are unaware of these distinctions may face unexpected barriers while seeking federal equivalency, Golden Visa eligibility, or access to certain professional pathways.

Labour-market alignment and graduate outcomes

Dubai's Education 33 "City of Students" initiative positions higher education as part of a broader talent attraction and retention strategy. At the federal level, Golden Visa schemes for "top students and graduates" offer 10-year residence permits for graduates of accredited UAE universities or top-100 foreign universities. Nevertheless, graduate employment outcomes across IBCs in UAE are uneven, with some students expressing dissatisfaction about limited placement opportunities and employer perceptions of branch-campus degrees.

Dependence on a narrow set of sending markets and disciplines

The heavy reliance on South Asian students, particularly Indians, and on business and IT streams exposes the Hub to demand shocks, regulatory changes in key source countries and shifts in global student flows (Bridi, 2020; Sareen, 2025; Wilkins et al., 2012). This concentration raises questions about the resilience of Dubai's hub model under changing geopolitical and economic conditions.

6.2 Malaysia - EduCity Iskandar

EduCity Iskandar is a commercially structured education hub located in Iskandar Puteri, Johor, and developed as part of the wider Iskandar Malaysia project. It is managed by Education@Iskandar Sdn Bhd, a subsidiary of Iskandar Investment Berhad, and is presented officially as Asia's first multi-campus education city spread across 305 acres. Its institutional profile is best understood not as a simple cluster of international branch campuses, but as a mixed higher education ecosystem comprising foreign branch campuses alongside local and private institutions.

Among its most visible foreign providers are Newcastle University Medicine Malaysia, the University of Southampton Malaysia, and the University of Reading Malaysia, alongside institutions such as the Netherlands Maritime University College, and Raffles University. The Hub has been marketed as a more affordable route to foreign degrees, although this claim is more

securely evidenced at the level of individual institutions than for EduCity as a whole. For example, the University of Reading Malaysia states that the total overall cost of studying at its Malaysia campus is about 40 per cent of the cost of studying at its UK campus, implying a saving of roughly 60 per cent. In strategic terms, EduCity is positioned as a regional education destination within Southeast Asia and as part of Malaysia's broader effort to align higher education development with regional economic growth.

Location: Kota Ilmu, Iskandar, Puteri, Johor, Malaysia

Year of establishment: 2007; 2011 (first IBC opened: Newcastle University Medicine Malaysia (NUMed))

The governing body: Subsidiary of Iskandar Investment Berhad (IIB); regulatory oversight: Ministry of Higher Education (MOHE) and Malaysian Qualifications Agency (MQA); designated Entry Point Project under Education, National Key Economic Areas (NKEA)

Number of IBCs: 5 IBCs

Name of the countries establishing IBCs: United Kingdom, The Netherlands, Singapore

i) Policy context

The policy: Malaysian Education Blueprint 2015–2025 Higher Education (MEB HE); *Strategik Pengajian Tinggi Negara* known as National Higher Education Strategic Plan (PSPTN), 2007; Economic Transformation Program (ETP), NKEA, 2010; Private Higher Educational Institutions Act 1996 (PHEIA); Malaysian Qualifications Framework (MQF), 2007; Iskandar Malaysia Development Plan, 2006 (IRDA, 2006; MoHE, 2015; MoHE Malaysia, 2007)

The regulatory body: Ministry of Higher Education (MOHE), MEB, PSPTN, PHEIA; *Pengurusan Prestasi dan Pelaksanaan* or Performance Management and Delivery Unit (PEMANDU), Prime Minister's Department, ETP, Malaysian Qualifications Agency (MQA); Iskandar Regional Development Authority (IRDA)

ii) Objectives of establishing the Hub

- To establish Malaysia as a leading regional hub for international education, with the target of attracting 250,000 international students by 2025, as outlined in the Malaysia Education Blueprint (Higher Education)
- To provide Malaysian and regional students access to UK-standard degrees at 40–70 per cent lower cost than studying in the UK
- To support the economic transformation of Iskandar Malaysia by supplying skilled graduates to the maritime, technology, healthcare, and commercial sectors
- To enable 100 per cent foreign ownership of education institutions within the Iskandar special zone, unique in Malaysia, to attract world-class universities without a local joint-venture requirement

iii) State Support

EduCity's institutional model is anchored in a state-linked development framework rather than in direct public university ownership. The wider hub is owned and managed through Iskandar Investment Berhad (IIB), the strategic developer of Iskandar Malaysia, whose shareholders are Khazanah Nasional Berhad, the Employees Provident Fund, and Kumpulan Prasarana Rakyat Johor. Within this framework, partner institutions operate on the basis of their own academic programs and institutional arrangements, while the hub provides the broader land, infrastructure, and shared-facilities' platform. The model aligns with national strategies such as the Economic Transformation (ETP) and the Malaysian Education Blueprint 2015–2025, particularly in advancing internationalization and a knowledge-based economy. Additionally, the framework is explicitly commercial, offering incentives such as tax exemptions and investment allowances administered by the Malaysian Investment Development Authority (MIDA) to attract foreign education providers.

iv) Requirements

- Universities must be globally recognized institutions with a strong academic reputation in their relevant disciplines
- Universities must prioritize the fields aligned with Iskankder Malaysia's economic development agenda, medicine, engineering, maritime management, business and technology
- Programs offered by the IBCs must align with Malaysia's national development priorities as articulated in Malaysian Education Blueprint 2015-2025 (Higher Education), the Economic

Transformation (ETP) and the Iskandar Malaysia Comprehensive Development Plan, particularly in sectors identified as National Key Economic Areas (NKEAs)

- Institutions must demonstrate commitment to the internationalization of Malaysian higher education by actively recruiting international students, engaging in cross-border research collaboration and contributing to Malaysia's target of positioning itself as a regional education hub as set out in government policy
- Campus policies, students' conduct frameworks and institutional communications must comply with Malaysian legal requirements, including the Universities and University Colleges Act 1971 (UUCA) and the Education Act 1996, which govern student rights, academic freedom, and institutional conduct within the Malaysian higher education system
- Institutions must comply with Malaysia's *Bumiputera*-sensitive (indigenous Malaya people) hiring and admissions, and demonstrate sensitivity to the national policy environment on equity, access, and inclusion in higher education

v) Quality Assessment

a. *Primary layer:* MQA Accreditation

   All programs must be registered, accredited and periodically reviewed by MQA; accreditation is the non-negotiable condition for legal operation

b. *Secondary layer:* Home-country professional body recognition, i.e., the universities establishing campuses should have requisite accreditation back in their home countries General Medical Council (GMC), UK and Malaysia Medical Council (MMC) for medicine, Board of Engineers Malaysia (engineering), and the MPharm Board (pharmacy), all of which recognize EduCity programs from their respective UK parent institutions

c. SETARA or *Sistem Penarafan Institusi Pendidikan Tinggi* is a national rating system used to evaluate the quality of teaching, research, and services at public and private higher education institutions in the region. D-SETARA on the other hand, is a discipline-based rating system that evaluates the quality of teaching and research for specific disciplines such as Health Sciences, Engineering or Hospitality at the bachelor's level

vi) Recognition of qualifications

a. The degrees are awarded by the parent UK institution, with the certificate reading Newcastle University, University of Southampton, or University of Reading, with no geographic qualifier. The qualifications gained at the Malaysia campus are legally and academically identical to the degree issued at the respective UK campuses.

b. The NUMed MBBS is recognized by the GMC, UK, the MMC Malaysia, the Medical Council of India (MCI), the Sri Lanka Medical Council (SLMC), the Medical Council of Thailand, and the World Directory of Medical Schools, and graduates are eligible for United States Medical Licensing Examination (USMLE)
c. All MQA-accredited EduCity programs are recognized by Malaysian employers, government service boards, and professional licensing bodies. Along with this, the UK degrees carry broad recognition across ASEAN, South Asia, and the Gulf Cooperation Council (GCC)

vii) IBCs in EduCity Iskandar, Malaysia

Sl No	Name of the IBC	Country of Origin
1	Newcastle University Medicine Malaysia (NUMed)	UK
2	University of Southampton, Malaysia Campus (USMC)	UK
3	University of Reading, Malaysia (UoRM)	UK
4	Raffles University, Iskandar (RUI)	Malaysia
5	Kolej MDIS Malaysia (MDIS Malaysia International College)	Singapore
6	(Netherlands Maritime University College (NMUC) formerly known as Netherlands Maritime Institute of Technology (NMIT)	Netherlands

Table 4: IBCs in EduCity Iskandar and their Countries of Origin

Scan this QR code to access a comprehensive PDF detailing the programs offered by international branch campuses within the above-selected hubs, including fee structures and levels of study.

viii) IBCs established beyond the Hub

Beyond the well-established education hubs, Malaysia is witnessing the gradual expansion of IBCs into emerging regions, reflecting a more decentralized model of transnational education. While the core cluster remains in hubs like Iskandar and Kuala Lumpur, institutions such as University of Nottingham Malaysia (UK), Monash University Malaysia (Australia), Heriot-Watt University Malaysia (UK), Xiamen University Malaysia (China), University of Reading Malaysia (UK), alongside emerging collaborations involving Indian institutions such as Manipal University College Malaysia, illustrate the growing diversity of source countries and institutional engagement.

Although the total number of IBCs remains under 15, their geographic and strategic dispersion signals Malaysia's intent to move beyond a hub-centric approach toward broader regional capacity-building, aligning with national priorities of access, equity, and internationalization.

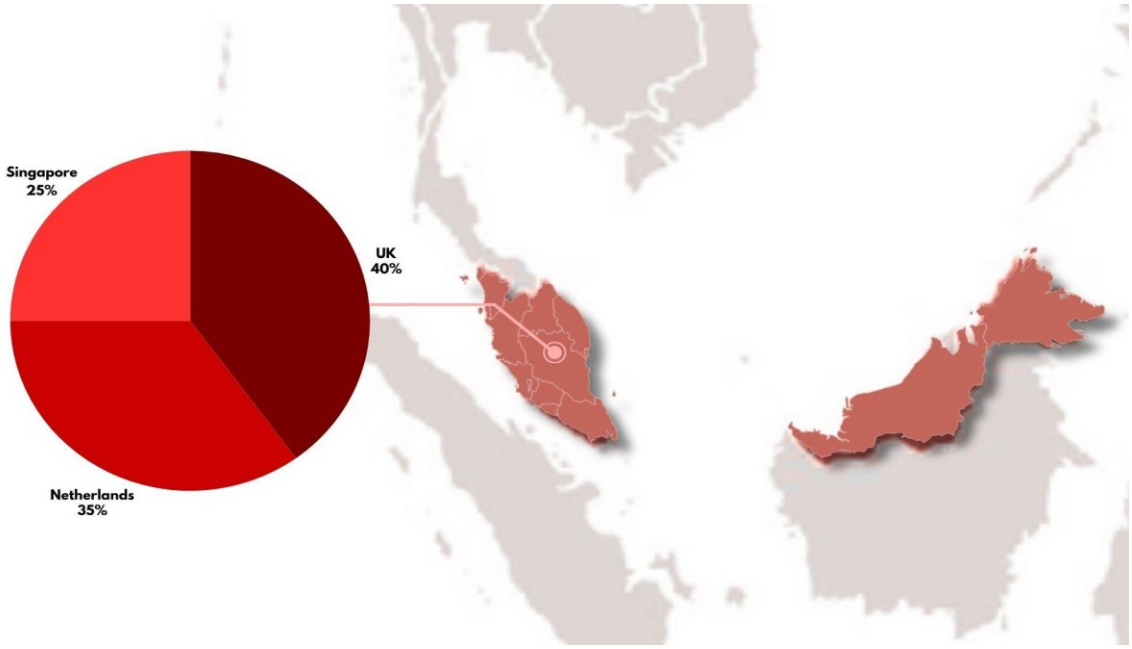

Figure 3: Distribution of IBCs in EduCity Iskander by Country of Origin

ix) Observations

Predominantly United Kingdom universities

EduCity's foreign university profile is visibly anchored in the reputation of universities in the UK. The hub officially presents itself as home to three UK universities, and these institutions have become central to its identity and market positioning. It reflects Malaysia's historical Commonwealth links, the continuing recognition of UK qualifications across parts of Southeast Asia, and South Asia, and the relative compatibility between EduCity's commercially oriented model and the offshore expansion strategies pursued by UK universities. The presence of Russell Group institutions further strengthens the hub's appeal among students seeking internationally recognizable credentials at a lower cost than full study in the UK.

Affordability as EduCity's primary competitive advantage

EduCity's defining value proposition is significant cost reduction relative to studying in the UK. The NUMed MBBS (Bachelor of Medicine, Bachelor of Surgery) costs approximately Rs

18,91,280 per year (domestic) versus over Rs 49,05,000 per year at the UK campus, a saving exceeding 50 per cent. The University of Southampton Malaysia's engineering programs under the 2+2 split-campus model reduce the total cost of the MEng (Master of Engineering) by 40–60 per cent. Business and computing programs cost Rs 7,14,400–Rs 8,83,600 annually, compared with over Rs 21,80,000 per year in the United Kingdom, making EduCity highly competitive for students from India, Indonesia, Bangladesh, Sri Lanka and the GCC.

Commercial model and risk of quality pressure

EduCity operates within a commercially structured framework in which institutions are expected to sustain themselves through recruitment and fee income rather than through open-ended public subsidy. This model gives the Hub flexibility and market responsiveness, but it also creates structural pressure. Where institutional sustainability depends heavily on enrollment and tuition flows, there is always a risk that program expansion and student intake may be shaped more by market demand than by purely academic considerations. Over time, this may produce tensions between commercial viability and the maintenance of rigorous academic standards associated with the home institution. This is not a certainty, but it is a built-in risk of fee-dependent offshore provision.

Below-target enrollment and scale constraints

EduCity's original development plan projected 16,000 students; actual enrollment remains substantially below this target. The niche disciplinary focus of individual IBCs (NUMed: medicine-only; NMUC: maritime-only) limits the aggregate number of students. Competition from larger, longer-established full branch campuses elsewhere in Malaysia, including Monash University Malaysia, the University of Nottingham Malaysia and Heriot-Watt University Malaysia, further constrains EduCity's recruitment pool, as these institutions offer broader programs portfolios, stronger domestic graduate employment networks, and longer alumni track records.

Regional competition constraint

EduCity’s location near Singapore is strategically advantageous, but it also creates a competitive constraint. Proximity to Singapore places EduCity within the shadow of a higher education system with stronger global brand recognition and widely perceived advantages in graduate outcomes and international visibility. For ambitious students making regional choices, this

reduces EduCity's ability to function as an uncontested destination. Its cross-border location therefore operates both as an asset and as a structural limitation.

6.3 Mauritius - Uniciti International Education Hub

Mauritius has positioned higher education as part of its broader transition towards a service and knowledge-based economy, and recent scholarship treats it as an emerging education hub rather than a fully consolidated one. Within this wider national strategy, the most visible private-sector-led initiative is the Uniciti International Education Hub (UIEH) developed by the Medine Group, which describes the hub as its education arm and states that its higher education institutions help advance Medine's vision of building a regional knowledge hub. UIEH presents itself as an integrated campus combining education, research, and innovation through partnerships with international institutions, and reports that it has attracted a growing student population with a distinct focus on the African continent. Mauritius' wider value proposition, as promoted by the Economic Development Board, rests on strategic location, relative affordability, quality assurance, and its positioning as an education destination for the Asian, African, and Australian regions. In this sense, Mauritius is best understood not as a mature education hub like Dubai or Qatar, but as a developing and hybrid model in which national policy ambition and private-sector institutional development have evolved together.

Location: Quatre Bornes, Mauritius

Year of establishment: 2014

Name of the governing body: Medine Group

No of IBCs: 6

Name of the countries establishing IBCs: France, India, the United Kingdom

i) Policy context

The policy: Two policies that have given direction to TNE in Mauritius are; a) Guidelines for the submission of project proposals for the establishment of private institutions, or branches, centres or campuses of overseas institutions, offering postsecondary education in the Republic of

Mauritius, 2005 b) Guidelines for Post-Secondary Overseas Recognized Accredited Institutions wishing to set up Post-Secondary Educational Institutions in Mauritius as a Separate Entity from the Parent Institutions, with Degree Awarding Powers at the Start of Activities, 2007

The regulatory body: Higher Education Commission (HEC), formerly known as Tertiary Education Commission (TEC)

ii) Objectives of establishing the Hub

- To transition the nation from an agricultural and textile-based economy into a high-tech, high-income, service and knowledge economy (According to the National Economic Agenda, 2001)

- To provide high-level tertiary education to Mauritian students and welcome students from the African region and beyond

iii) State Support

In the case of Mauritius, the development of the Uniciti International Education Hub has taken place within a largely enabling policy environment rather than through direct state financing. The hub is best understood as a privately funded and privately developed initiative led by the Medine Group, while remaining aligned with the country's broader economic vision of transition towards a service- and knowledge-driven economy.

iv) Requirements

- The overseas institution establishing campuses in Mauritius is required to have a minimum operational history of four years or should have passed out at least two cohorts in the same field of study
- The institution must have been fully compliant with its regulatory body in the country of origin and has not contravened any regulations of the latter
- Promoters of the institution have not been convicted of any criminal offence during the time of application
- The institution should be financial sustainable and has sufficient technical and staffing resources to support range of qualifications that intends to offer in Mauritius

v) Quality Assessment

- Quality Assurance Authority (QAA) will ensure the quality of the foreign HEIs

– Professional programs in engineering and health sciences must receive clearance from the Mauritius Council of Registered Engineers and the Mauritius Nursing Council or Medical Council, before being considered by the Higher Education Commission

vi) Recognition of qualification

In Mauritius, TEC provides two different sets of guidelines for the recognition of qualifications obtained from these overseas institutions.

a. The degrees offered by the branch campuses or centers of overseas institutions will have the qualifications under the parent institutions
b. The degrees offered by the foreign institutions that is sperate from parent institutions award local degrees. That is, it enables the foreign-owned private HEI to be accredited to offer local qualifications.

vii) IBCs in Uniciti International Education Hub, Mauritius

Sl No	Name of the IBC	Country of Origin
1	ENSA Nantes	France
2	Middlesex University	UK
3	SUPINFO part of IONIS Education Group	France
4	Swansea University	UK
5	Universite Paris Pantheon - Assas	France
6	Vatel – Hospitality Management School	France

Table 5 IBCs in the Uniciti International Education Hub, Mauritius, and their Countries of Origin

Scan this QR code to access a comprehensive PDF detailing the programs offered by international branch campuses within the above-selected hubs, including fee structures and levels of study.

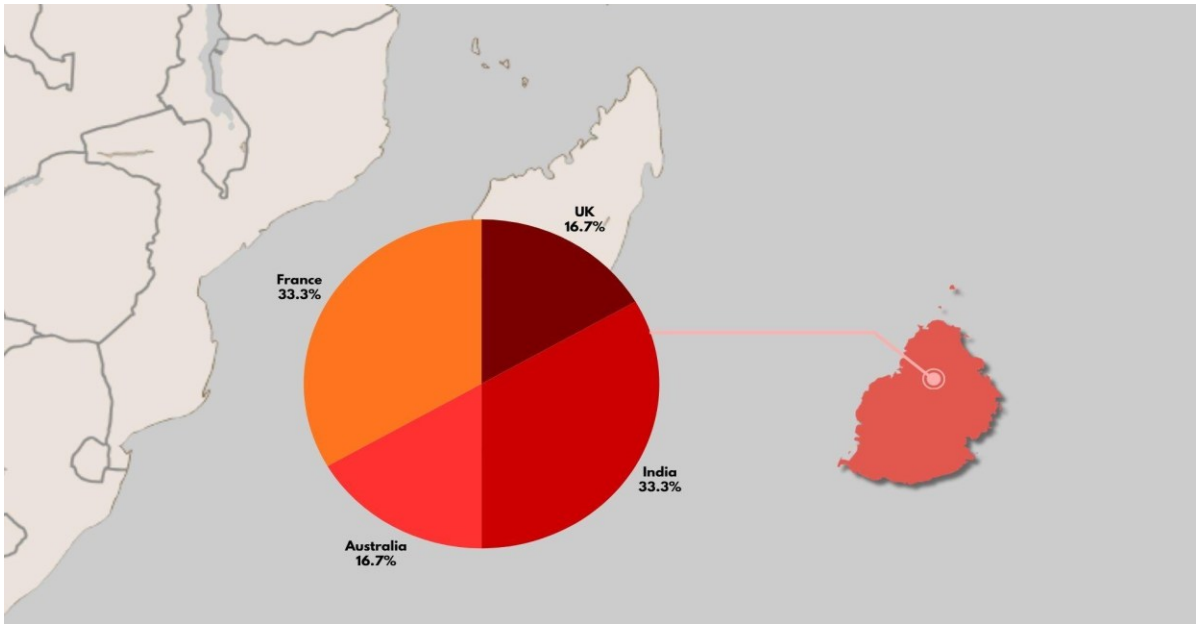

Figure 4: Distribution of IBCs in the Uniciti International Education Hub, Mauritius by Country of Origin

viii) Observations

Private actors in education hub development

Mauritius marks the growing role of private actors in education hub development and differs from more state-financed hub models and highlights how private developers can play a central role in building transnational education platforms within an enabling national policy environment.

Clarity in Institutional Exit Guidelines

The Mauritian regulatory framework provides comparatively clear provisions on institutional exit and student protection. Official guidelines require applicants setting up overseas-recognized post-secondary institutions in Mauritius to demonstrate that, in the event of closure, enrolled students will be guaranteed continuation either at the parent institution overseas or at another approved institution, and at a comparable fee level. This gives the system a degree of procedural clarity that is not always visible in other transnational education environments.

Recognition framework exists, but outcomes may still vary by context

Mauritius does not lack a formal framework for the recognition and equivalence of qualifications. This does not eliminate variation in how qualifications may be interpreted across

professions, institutions, or labour-market settings and the possibility that recognition in practice may differ depending on disciplinary and institutional context.

Diverse offerings beyond STEM

Mauritius also supports a broader disciplinary mix than some education hubs that are more heavily concentrated in STEM and business-oriented provision. Offerings associated with hub-linked institutions and partner platforms extend into areas such as law, architecture, nursing, management, design, and digital disciplines. This diversity broadens the appeal of the Mauritian model and suggests that its hub development strategy is not confined to a narrow science and technology template.

Expanding role of EdTech and non-traditional actors

The Mauritian case further outlines the expanding role of EdTech and non-traditional actors within transnational education ecosystems. The Uniciti International Education Hub officially serves as regional representative for FutureLearn in Mauritius and neighbouring island territories, while also hosting or partnering with institutions linked to wider private education networks such as IONIS through SUPINFO. These developments suggest that hub formation is no longer driven only by conventional universities, but increasingly by hybrid ecosystems that combine higher education institutions and private-sector education networks.

6.4 Qatar - Education City, Doha

Qatar Education City is best understood as a state-philanthropic education hub and one of the earliest and most consequential models of international hub development in higher education. Its institutional origins lie in the establishment of Qatar Foundation in 1995, while the hub became operational in 1998. Today, Education City is presented by Qatar Foundation as a campus of more than 12 square kilometres that brings together eight world-class American and French universities, including Carnegie Mellon University in Qatar, Georgetown University, Weill Cornell Medicine-Qatar, and Northwestern University, alongside Qatar Foundation's own research university, Hamad Bin Khalifa University. In comparative terms, its significance lies not only in age, but in the scale and coherence of its model. Education City was designed as a structured platform through which global academic institutions could be brought into Qatar within a single, state-supported ecosystem. Qatar Foundation (QF) owns, builds, and fully funds all campus infrastructure at no cost to partner universities, with the State covering tuition costs entirely for Qatari nationals. The

Hub is the primary instrument of Qatar National Vision 2030's human development pillar, designed to build a post-hydrocarbon knowledge economy by importing global academic excellence rather than building indigenous institutions from the ground up.

Location: Al Luqta, Doha, Qatar

Year of establishment: 1998 (first IBC: VCUarts Qatar); Qatar Foundation established by Emiri Decree, 1995

Name of the governing body: Qatar Foundation for Education, Science and Community Development (QF); regulatory oversight: Ministry of Education and Higher Education (MOEHE), Qatar

Number of IBCs: 8 (plus HBKU Qatar Foundation's own domestic research university)

Name of the countries establishing IBCs: USA and France (1)

i) Policy context

The Policy: Qatar National Vision 2030 (QNV 2030); National Development Strategy (NDS I: 2011–16, NDS II: 2018–22); Higher Education Law No. 11 of 2004; Quality Assurance and Accreditation System for Education (QAAET), 2008; Qatar National Research Strategy, 2012 (Government of Qatar, 2008, 2008, 2024; Supreme Education Council, Qatar, 2004).

The regulatory body: General Secretariat for Development Planning, Supreme Education Council (SEC), Ministry of Education and Higher Education (MOEHE), Quality Assurance and Accreditation System for Education and Training (QAAET); Qatar National Research Foundation (QNRF)

ii) Objective of establishing the Hub

- Rapidly build world-class domestic higher education capacity and reduce outward student migration
- Produce graduates for the post-hydrocarbon knowledge economy: STEM, medicine, computing, business, media, and international affairs

- Build national research capacity in priority areas, energy, health, computing and environment through co-located institutes and QNRF grants
- Project Qatar internationally as an open, knowledge-driven state; use higher education as a soft power instrument

iii) State Support

In Qatar, state support is delivered through a state–philanthropic model anchored by Qatar Foundation, which owns and finances all land and infrastructure, while partner universities focus on academic provision. This approach aligns with the Qatar National Vision 2030, particularly its Human Development and Economic Diversification pillars. The support is largely direct, including full scholarships for Qatari nationals, provision of utilities and shared services, and a tax-free operating environment. Partner institutions operate under structured service agreements and are not required to rely on tuition revenue for financial sustainability.

iv) Requirements

- Home-country accreditation must extend fully to the Qatar campus
- No published QS minimum; selection is mission-driven, prioritizing disciplinary fit with QNV 2030 priority sectors and global leadership in the field
- Both public and private universities are eligible. Cultural compliance with Qatari norms and Islamic values is mandatory and audited annually by QF.

v) Quality Assessment

- Home-country accreditation is the primary quality assurance mechanism, legally mandated in QF service agreements; each IBC undergoes the same accreditation cycle as the home campus
- QAAET conducts mandatory periodic institutional reviews of all HEIs in Qatar, including IBCs, supplementing home-country accreditation, not replacing it
- QF service agreements set measurable performance obligations: enrolment targets, faculty qualification ratios, research output benchmarks and graduate employment rates, monitored by the QF Education Advisory Board

- **Specific accreditation applies simultaneously:** Accreditation Board for Engineering and Technology (ABET) (engineering), Association to Advance Collegiate Schools of Business (AACSB) (business), Liaison Committee on Medical Education (LCME) (medicine), National Association of Schools of Art and Design (NASAD) (arts)

vi) Recognition of qualification

- The parent institution issues degrees that are legally and academically identical to degrees earned at the home campus; the certificate carries no geographic qualifier

- Fully recognized in the USA, Qatar (MOEHE) and across all GCC member states, Weill Cornell Medicine-Qatar graduates are eligible for the USMLE and recognized by the Medical Council of India (MCI), Sri Lanka Medical Council and Medical Council of Thailand

vii) IBCs in EducationCity, Qatar

Sl No.	Name of the IBC	Country of Origin
1	Northwestern University in Qatar (NU-Q)	USA
2	VCUarts Qatar (Virginia Commonwealth University)	USA
3	Texas A&M University at Qatar	USA
4	Carnegie Mellon University in Qatar	USA
5	Georgetown University in Qatar	USA
6	Weill Cornell Medicine-Qatar	USA
7	HEC Paris, Private	France

Table 6: IBCs in the Education City, Qatar and their Countries of Origin

Scan this QR code to access a comprehensive PDF detailing the programs offered by international branch campuses within the above-selected hubs, including fee structures and levels of study.

viii) IBCs established beyond the Hub

While Education City is Qatar's flagship transnational education initiative, Qatar's IBC landscape extends beyond it. Stenden University of Applied Sciences (Netherlands) established a campus in Doha in 2008, offering hospitality, tourism, and business programs on a fully commercial basis, receiving no Qatar Foundation subsidy and being entirely dependent on tuition revenue, making

it structurally closer to the Malaysia EduCity model than to Education City's philanthropic framework.

UCL Qatar, the Doha campus of University College London, operated from 2012 to 2021 in partnership with Qatar Museums, offering postgraduate programs in conservation, museum studies, and archaeology. Its closure in 2021 following a UCL strategic review mirrors the Texas A&M departure, reinforcing the systemic vulnerability across all hub models: even well-resourced, mission-aligned IBC partnerships remain contingent on the parent evolving domestic priorities, and no host-state investment, however substantial, guarantees institutional continuity without enforceable contractual commitment.

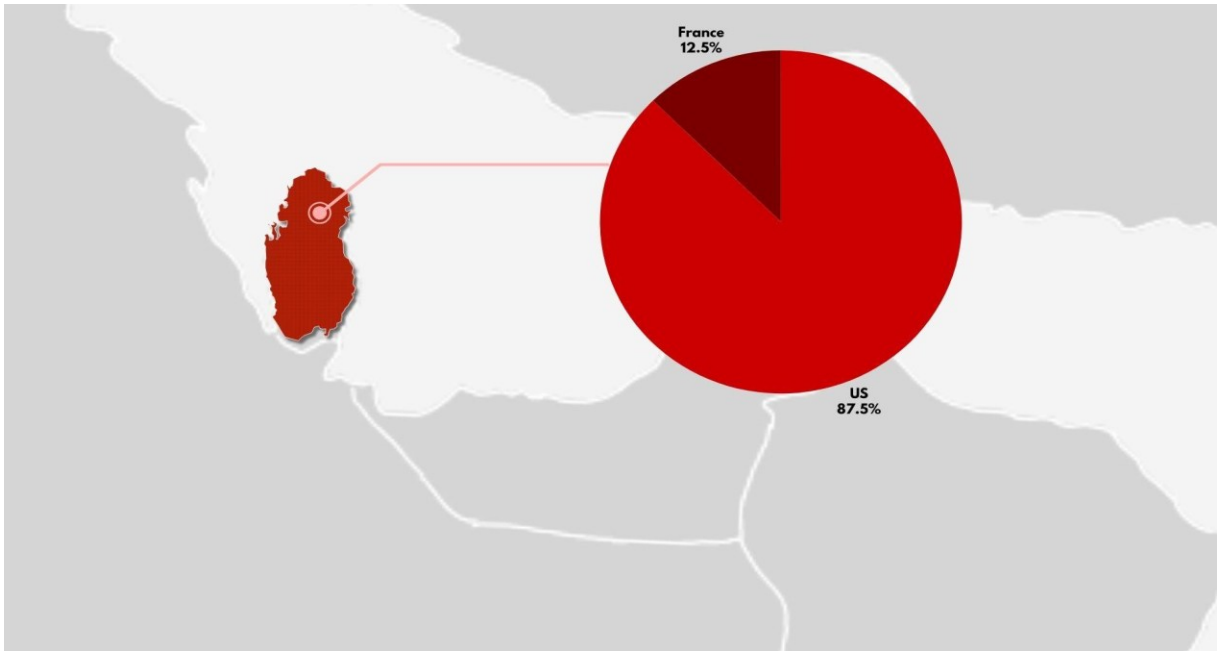

Figure 4: Distribution of IBCs in Qatar by Country of Origin

i) Observations

Predominantly United States universities

Qatar deliberately selected American universities to deepen the Qatar-US strategic relationship (Al Udeid Air Base + US universities = dual-track partnership), leverage US disciplinary prestige in targeted fields (Carnegie Mellon University in Qatar for computing, Weill Cornell Medicine-Qatar for medicine, Georgetown University in Qatar for diplomacy), and align with the

philanthropic campus-funding model culturally familiar to American research universities. The universities in the UK and Australia accustomed to commercially profitable offshore operations, are structurally incompatible with QF's cost-covered, but tightly controlled, non-commercial model.

Non-commercial model strength and structural vulnerability

Qatar Foundation absorbs all campus infrastructure and operating costs, removing commercial pressure and protecting academic quality. However, this eliminates partner universities' financial stake: Texas A&M University departed in 2024 after receiving over USD 500 million from QF across two decades, when US Section 117 foreign-funding scrutiny made continued presence. The disclosure obligations exposed the institution to scrutiny from US lawmakers and domestic stakeholders at a moment of heightened US-Gulf political sensitivity. The departure revealed a structural vulnerability in the Education City model.

Scale relative to Qatar's small national population

Despite a multi-billion-dollar investment, total enrollment in Education City is estimated at 10,000–12,000 students. Qatar nationals number approximately 380,000, around 11 per cent of the country's total population, and cannot sustain hub enrollment on their own. Most students are non-Qatari residents or internationals, raising the question of whether Education City primarily develops Qatari national human capital or serves as an education amenity for the expatriate majority.

Commercialization of education

Education City is explicitly non-commercial. No institution is operated for profit, and fees are set at home-campus parity rather than at market-optimized prices. This protects quality and resists credential inflation. The risk is that commercial indifference on the host side does not insulate the Hub from commercially driven exits on the partner side, as the Texas A&M University Qatar case demonstrates, highlighting academic freedom tensions and geopolitical vulnerability.

Institutionalized Cultural Compliance

In Qatar, TNE operated within a distinct regulatory cultural framework wherein compliance with national norms and Islamic values are formally mandated and subject to periodic review by

QF. This positions Qatar as a unique education hub where cultural alignment is institutionally embedded as a requirement for IBCs.

6.5 Singapore – Global Schoolhouse Initiative

Singapore has emerged as one of Asia's most important sites for transnational higher education in the past decade. Its significance lies not simply in the presence of foreign universities, but in the way the state deliberately integrated higher education into a broader national project of economic restructuring, talent attraction, and innovation-led growth. The Global Schoolhouse initiative was a central part of this effort, backed by a whole of government approach involving multiple agencies and designed to build Singapore into a distinct education hub with a strong international student base. And so, Singapore's education hub strategy is closely tied to its wider knowledge economy agenda. That logic continues in more recent policy through the Research, Innovation and Enterprise 2025 Plan, which explicitly seeks to anchor Singapore as a 'Global-Asia node of technology, innovation and enterprise'. In this sense, Singapore's education hub is important because higher education is treated as strategic infrastructure for competitiveness, global connectivity, and long-term national development.

Location: Singapore (citywide)

Year of establishment: 2002 (Global Schoolhouse initiative)

Name of the governing body: Ministry of Education (MOE); SkillsFuture Singapore (SSG) through the private-education regulatory regime; and the Singapore Economic Development Board (EDB) in the original education-hub push under Global Schoolhouse

No of IBCs: 10

Name of the countries establishing IBCs: Australia, France, Germany, India, and the United States

i) Policy context

The Policy: Global Schoolhouse - 2002; Private Education Act - 2009; EduTrust announced in 2008 for launch in early 2009; SkillsFuture – 2015 (SFS, 2019; Singapore Statutes Online, 2009).

The regulatory body: MTI / EDB for Global Schoolhouse; MOE for the Private Education Act; SSG for EduTrust; SkillsFuture Singapore for SkillsFuture

ii) Objective of establishing the Hub

- To develop Singapore as an education hub while also treating higher education as a contributor to economic growth and the wider knowledge economy
- To make education a strategic component of Singapore's wider economic and talent-development architecture
- To build industry-relevant human resource capabilities by embedding higher education more closely within national skill formation and research capacity
- To attract, develop, and retain skilled individuals who could contribute to the country's long-term economic competitiveness

iv) State support

In Singapore, state support for higher education internationalization has generally been more selective, project-based, and institution-specific than in fully state-built hub models. Historical scholarship on the Global Schoolhouse period indicates that the government used targeted subsidies, incentives, and facilitative policies to attract chosen foreign institutions rather than extending a single uniform funding model across the sector. In the current phase, support is more visible through the wider research, talent, and student-funding ecosystem than through a dedicated hub-financing structure. This is evident, for example, in the Tuition Grant Scheme, under which eligible students in selected full-time diploma and undergraduate programs receive subsidized tuition. However, Permanent Residents and international students are required to serve a three-year bond after graduation. Meanwhile, selected postgraduate researchers can receive the Service Obligation Scheme, both tied to a three-year bond with a Singapore entity. Singapore is also investing S$37 billion (Rs 2.33 lakh crore) under RIE2030 into the research and innovation ecosystem.

v) Requirements

Private education institutions must register under Singapore's regulatory framework. Official SSG requirements include appropriate corporate status, suitable premises, fit-and-proper managers, an Academic Board, an Examination Board, at least one permitted program, qualified teachers, proper program administration, and compliance with advertising and disclosure rules.

vi) Quality Assessment

Singapore's private and foreign-provider system is built around a two-tier regulatory model: the Enhanced Registration Framework (ERF) for baseline operating requirements and EduTrust for quality assurance. SkillsFuture Singapore describes EduTrust as the quality-assurance scheme for private education institutions in Singapore. SkillsFuture's student guide also explicitly advises students to check how foreign-university programs in Singapore are benchmarked against the home campus.

vii) Recognition of qualification

Singapore does not have a central authority that recognizes certificates or qualifications issued by private schools, nor a central authority that recognizes overseas degrees. Recognition for employment or further study is generally left to employers, professional bodies, and receiving academic institutions.

viii) IBCs in Singapore

Sl No.	Name of the IBC	Country of Origin
1	Curtin Singapore	Australia
2	DigiPen Institute of Technology Singapore	US
3	EDHEC Business School Singapore	France
4	ESSEC Asia-Pacific	France
5	INSEAD Asia Campus	France
6	James Cook University Singapore	Australia
7	Newcastle Australia Institute of Higher Education (NAIHE)	Australia
8	S P Jain School of Global Management, Singapore	India
9	Technical University of Munich Asia (TUM Asia)	Germany
10	The Culinary Institute of America Singapore	US

Table 7: IBCs in Singapore and their Countries of Origin

Scan this QR code to access a comprehensive PDF detailing the programs offered by international branch campuses within the above-selected hubs, including fee structures and levels of study.

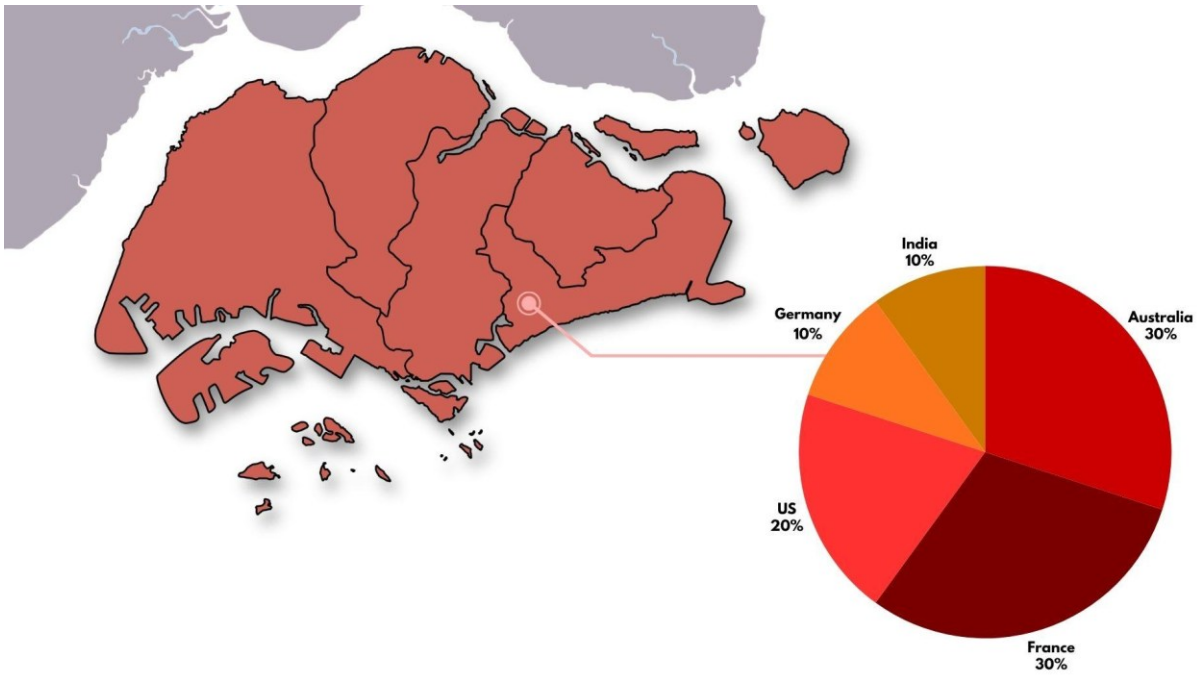

Figure 5: Distribution of IBCs in Singapore by Country of Origin

ix) Observations

Singapore is a regulated citywide hub

The Singapore model is better understood as a nationally governed urban higher education environment in which foreign institutions operate within a wider regulatory architecture shaped by state agencies and national policy priorities. In this sense, Singapore differs from hubs such as Dubai International Academic City or Qatar Education City, where the hub is spatially concentrated and institutionally bounded.

The foreign-campus footprint is smaller and more selective

Singapore's foreign-campus presence is also relatively limited and selective when compared with large branch-campus clusters elsewhere. Its profile has been built around a narrower set of specialist overseas institutions rather than a very large concentration of foreign campuses. This selectivity reflects the fact that Singapore's hub strategy was never simply about maximizing

provider numbers, it was also about attracting institutions seen as capable of contributing to targeted knowledge, talent, and industry objectives.

Quality assurance is structured, but recognition is decentralized

Singapore has a comparatively strong regulatory framework for private higher education providers through the Enhanced Registration Framework and the EduTrust Certification Scheme. These mechanisms establish minimum operating standards and, in the case of EduTrust, require a higher level of institutional quality assurance. However, this does not amount to centralized recognition of qualifications. Official guidance states clearly that there is no single authority in Singapore that automatically accords recognition to certificates and qualifications. Acceptance ultimately depends on the prospective employer or higher education institution. The system is therefore tightly regulated at the provider level, but more decentralized in the recognition of qualifications than many assume.

The policy model has shifted from hub-building to skills-and-talent alignment

Singapore's policy trajectory has also shifted over time. The Global Schoolhouse initiative, formally announced in 2002, was closely tied to hub-building ambitions and to the positioning of Singapore as a regional centre for higher education. In later years, however, the policy emphasis moved more decisively towards workforce capability, employability, reskilling, and lifelong learning. This shift is visible in the SkillsFuture movement, launched in 2015, which explicitly frames education and training as part of a continuing national effort to build future-ready skills and support career development across the life course.

7. India and Transnational Education

India's engagement with transnational education can be situated within its broader historical trajectory of cross-border higher education. Historically, India served as a major center of global knowledge exchange, with institutions such as Nalanda University, Takshashila, Vikramshila, and Vallabhi attracting students from across Asia. However, this outward orientation was lost in history that witnessed external aggression from different parts of the world. After 1947, India's higher education policy was primarily shaped by nation-building priorities, leading to a strong focus on expanding domestic capacity rather than fostering international engagement. This phase saw the establishment of key national institutions such as the Indian Institutes of Technology, and the

Indian Institutes of Management, with an emphasis on STEM education, but with limited attention to international collaboration.

A gradual shift began in the 1990s, when economic liberalization and globalization reoriented India's higher education system towards external engagement. Increased academic collaborations, student mobility, and institutional partnerships marked this phase, making the system more outward-looking. Nevertheless, this engagement remained largely unidirectional as India served, and continues to serve as one of the largest source countries for outbound mobility, with approximately 13 lakh students studying abroad in 2023 (NITI Ayog, 2025). While this reflects strong global aspirations and the international success of Indian graduates, it also highlights structural limitations such as brain drain and persistent gaps in domestic institutional capacity.

Recognizing these challenges, India's policy approach has gradually evolved from a participative approach towards internationalization to a more strategic and regulated engagement. Early policy efforts, including the University Grants Commission's (UGC) Promotion of Higher Education Abroad – PIHEAD initiative (2002), the 2009 internationalization plan, and the Foreign Universities Bill (2010), indicated an emerging interest in IHE but faced implementation constraints due to regulatory and political limitations. As a result, meaningful progress in this domain remained limited during this period (Varghese & Mathews, 2021).

A more coherent and decisive policy framework emerged with the introduction of the National Education Policy 2020, which emphasizes internationalization with quality enhancement and wishes to position India as hub for international higher education. Unlike earlier efforts, the policy moves beyond student mobility and actively promotes multiple forms of TNE, including foreign university campuses, collaborative degree programs, and offshore expansion of Indian institutions. This shift has been operationalized through a series of regulatory measures introduced by the UGC, such as

1) Regulations on Institutions of Eminence Deemed to be Universities (Amendment) Regulations, 2021 (UGC, 2021b)

2) Guidelines on Internationalization of Higher Education, 2021(UGC, 2021a)

3) Regulations to offer Twinning, Joint Degree and Dual Degrees, 2022 (UGC, 2022)

4) Regulations on Setting up and Operation of Campuses of Foreign Higher Educational Institutions in India, 2023, (UGC, 2023) and

5) Regulations of Recognition and Grant Equivalence to Qualifications obtained from Foreign Education Institutions, 2025 (UGC, 2025)

Lately, India's approach has moved towards creating dedicated ecosystems for TNE through the establishment of education hubs. Initiatives such as GIFT City, regulated by the International Financial Services Centres Authority (IFSCA), and the International Education City in Navi Mumbai - EduCity - under the UGC framework, reflect a strategic shift from policy intent to institutional implementation. These developments signal India's transition from being primarily a sender of students to actively hosting foreign institutions and integrating into the international education landscape through structured TNE models.

7.1 IFSCA versus UGC

India has set a dual regulatory approach, such as the IFSCA Regulations for the IBCs established in the GIFT City and UGC Regulations for the IBCs operating and set to operate across major cities such as Navi Mumbai, Delhi, Gurugram, Greater Noida, Chennai, and Bengaluru.

IFSCA, established under the IFSCA Act, 2019, is mandated to develop and regulate financial institutions, services and products within the International Financial Services Centre (IFSC). Higher Education is viewed as a service, and to operationalize this, the IFSCA released the Setting up and Operation of International Branch Campuses and Offshore Education Centres Regulations in 2022.

Following this, in 2023, the UGC released the Regulations on Setting up and Operation of Campuses of Foreign Higher Educational Institutions in India, extending the regulatory framework to IBCs that establish campuses beyond GIFT City, supporting the objective of *Internationalization@home*. While both frameworks facilitate the establishment of foreign HEIs, they differ significantly in terms of the range of disciplines permitted, regulatory frameworks, financial arrangements and operational flexibility.

Currently, five IBCs operate in GIFT City under the IFSCA Regulations and 15 operate under the UGC model across locations such as EduCity - Navi Mumbai, Delhi, Gurugram, Greater Noida, Bengaluru, and Chennai. The below Table 8 outlines the key similarities and differences between

these two regulatory models, followed by a detailed description of education hubs such as GIFT City and EduCity, and the IBCs beyond these education hubs.

Key Feature	**GIFT City Model**	**UGC Onshore Campus Model**
Governing Authority	IFSCA	UGC
Launch year	February 2022	November 2023
Total number of IBCs (As of 2026)	4 FHEIs	16 FHEIs
Requirements	FU: QS Top 500 overall/ subject ranking FEI: Reputed in home jurisdiction	Top 500 overall or subject-wise in world rankings or exceptional expertise as decided by the committee
Permissible Legal Structure	1. Standalone 2. Collaboration with Academic Infrastructure Service Providers	1. Independent IBC 2. Joint Venture with Indian HEI/company (Must maintain own campus)
Course level	Bachelor's to Post-Doctoral programs	Bachelor's to Post-Doctoral programs
Permitted Subject Areas	Financial Management, FinTech, STEM	No restriction on subjects
Design	Full autonomy in curriculum, admission, fees	Full autonomy in curriculum, admission, fees
Course Recognition	Degree identical to parent university, recognized as foreign qualification	Degree same as parent university
Equivalence	Equivalence subject to Indian agency approval	Automatically equivalent to Indian degrees for all purposes
Industry-academia linkage	Co-located with financial institutions in GIFT City strong integration	Partnerships possible but not location-linked

Approval validity	5 years + renewal every 5 years in perpetuity	Perpetual (as long as compliant)

Table 8: Comparison of the IFSCA and UGC Regulatory Models for Foreign Campuses in India (NITI Ayog, 2025)

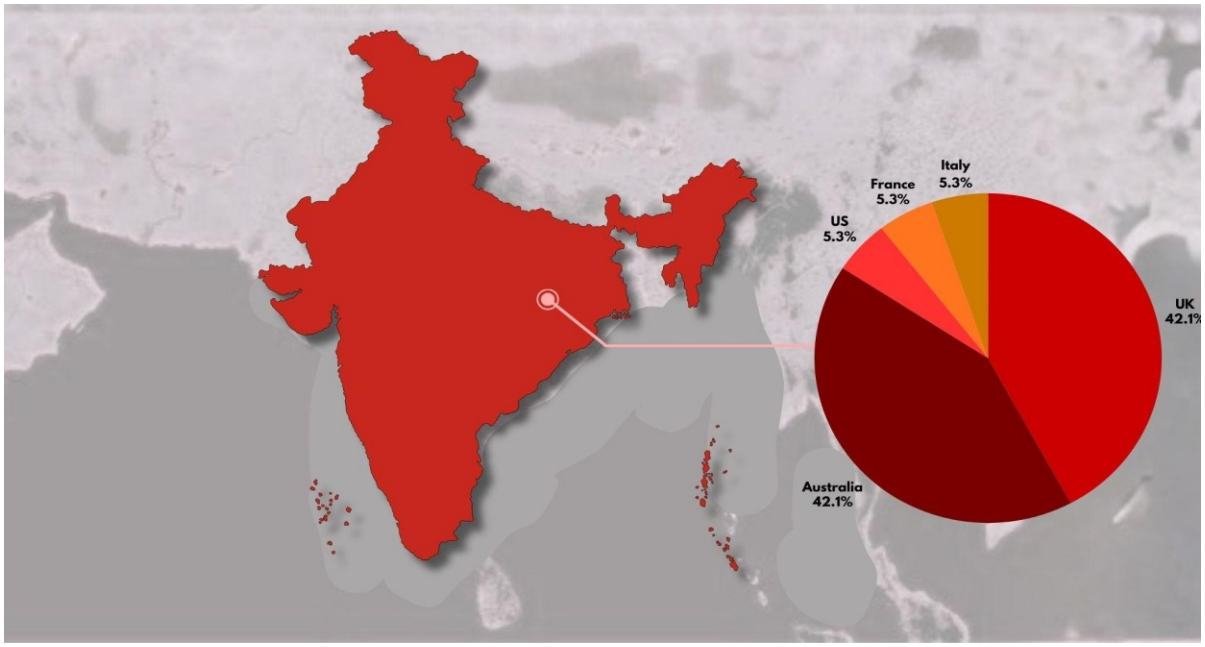

Figure 6: Distribution of IBCs in India by Country of Origin

7.2 GIFT City – Gujarat International Finance Tec-City

Gujarat International Finance Tec-City (GIFT City) is best understood as a specialized regulatory and institutional ecosystem through which India has begun to operationalize foreign campus entry in a controlled manner. Spread across an integrated development planned for 62 million square feet of built-up area, GIFT City was conceived primarily as an international financial and business district, but it has increasingly been extended into the higher education domain as part of a broader strategy of ecosystem-building. A major policy turning point came in the Union Budget 2022–23, which announced that world-class foreign universities and institutions would be allowed in GIFT City to offer courses in Financial Management, FinTech, Science, Technology, Engineering and Mathematics, free from domestic regulations except those of the IFSCA.

Location: Gandhinagar, Gujarat

Year of establishment: 2015

Name of the governing body: International Financial Services Centre Authority (IFSCA)

No of IBCs: 5

Name of the countries establishing IBCs: Australia and the United Kingdom

i) Policy context

The policy: International Financial Services Centres Authority (Setting up and Operation of International Branch Campuses and Offshore Education Centres) Regulations, 2022

The Regulatory Body: IFSCA

ii) Objective of the host country

- To make India a Global Higher Education hub offering premium education at affordable costs
- To facilitate the availability of high-end human resources for financial services and technology

iii) State support

The Government of India (GoI) provides substantial support through fiscal incentives, such as a 10-year tax holiday within a 15-year period, zero per cent Goods & Services Tax (GST) for IFSC units, and no Securities Transaction Tax (STT) or Commodity Transaction Tax (CTT).

iv) Requirements

- For Foreign University - Should have a secure position within the Top 500 in global overall ranking and/or subject ranking in the latest QS World Universities ranking
- For Foreign Educational Institution – should be a reputed institution in its home jurisdiction

v) Quality Assessment

- During the time of registration, the latest Quality Assurance Audit report from a recognized Quality Assurance Agency in the home jurisdiction of the Applicant is to be submitted
- The IBC shall undergo a quality assurance audit as specified and submit the report to the Authority at the time of renewal of registration

vi) Recognition of qualification

The degree, diploma, or certificate issued with respect to courses or programs conducted in the GIFT IFSC shall enjoy the same recognition and status as if they were conducted by the Parent Entity in its home jurisdiction.

vii) IBCs in GIFT City

Sl No	Name of the IBC	Country of Origin
1	Deakin University	Australia
2	University of Wollongong	Australia
3	Queen's University	UK
4	Coventry University	UK
5	University of Surrey	UK

Table 9:IBCs in GIFT City and their countries of origin

Scan this QR code to access a comprehensive PDF detailing the programs offered by international branch campuses within the above-selected hubs, including fee structures and levels of study.

7.3 Navi Mumbai - International EduCity

International EduCity in Navi Mumbai has been developed as part of the broader initiative of the Government of Maharashtra called the "Mumbai Rising: Creating International Education City," aimed at establishing a global hub of higher education and innovation. It was established under the 2023 UGC Regulations for Setting Up of Foreign Higher Educational Institutions in India, 2023. It is a part of the Centre of Excellence (CoE) initiative led by the City and Industrial Development Corporation (CIDCO). With an investment of approximately Rs 890 crores, CIDCO has developed a 250-acre International EduCity, to position Navi Mumbai as a city of ideas. This hub offers diverse range of academic programs, such as business, economics, computer science, public health, data science, and design, etc.

Location: Navi Mumbai

Year of establishment: 2025

Government authority: City and Industrial Development Corporation of Maharashtra Limited (CIDCO)

No of IBCs: 7

Name of the countries establishing IBCs: UK, Australia, France, Italy and the US

i) Policy context

The policy: UGC (Setting Up and Operation of Campuses of Foreign Higher Education Institutions in India), 2023; and Regulations of Recognition and Grant Equivalence to Qualifications obtained from Foreign Education Institutions, 2025

The regulatory body: University Grants Commission (UGC)

ii) Objectives

- To position India not just as participant but also a shaper of global education ecosystem
- To enable innovation-led growth through education, leading to Viksit Bharat 2047

iii) State Support

The IBCs are supported by the CIDCO of Maharashtra with an allocation of about Rs. 116.5 crore for the infrastructural development of EduCity. In the first phase, about 10 hectares of land is allotted to each university, and at least 30 sq. meters of built-up area per student is provided (Hindustan Times, 2024).

iv) Requirements

- Foreign Higher Education Institutions (FHEIs) must have secured a position of top 500 in overall category of global ranking or top 500 in the subject-wise category of global rankings
- When two or more FHEIs are collaborating, each of them should meet the above criteria

v) Quality Assessment

During the time of application, the respective FHEI must submit the latest Accreditation or Quality Assurance report from a recognized Body

vi) Recognition of qualification

- Qualifications awarded to students in FHEIs in the Indian campus shall enjoy the same recognition and status as if they were conducted in the country of origin of foreign HEI.
- Qualifications awarded shall be equivalent to any corresponding degree awarded by the Indian HEI for all purposes such as higher education and employment. There shall be no further requirement of seeking equivalence from any authority.

vii) IBCs in EduCity, Navi Mumbai

Sl No	Name of the IBC	Country of Origin
1	University of York	UK
2	University of Aberdeen	UK
3	University of Bristol	UK
4	University of Western Australia	Australia
5	Illinois Institute of Technology	USA
6	Instituto Europea di Design	Italy
7	Essec Business School	France

Table 10: IBCs in Navi Mumbai EduCity and their countries of origin

Scan this QR code to access a comprehensive PDF detailing the programs offered by international branch campuses within the above-selected hubs, including fee structures and levels of study.

7.4 IBCs established beyond the education hubs in India

Beyond the above education hubs, IBCs are established under UGC model across major metropolitan cities such as Delhi-NCR, Greater Noida, Bengaluru and Chennai. These cities are strategically significant due to their established Institutions of National Importance, such as IITs, IIMs, IISC, etc., and access to global connectivity with key international airports. Bengaluru serves as India's software development hub, facilitating IBCs to have industry collaboration, particularly in technology-driven fields. Chennai, with its robust economic base and growing international engagement, further supports this expansion through state-led initiatives such as the Knowledge City project, aimed at positioning the region as a centre for global education and advanced research (Niazi, 2025). These factors make metropolitan cities attractive destination for the expansion of IBCs.

Sl No	Name of the IBC	Country of Origin
1	University of Southampton |Gurugram	UK
2	Victoria University |Delhi	Australia
3	Western Sydney University |Greater Noida	Australia
4	University of New South Wales| Bengaluru	UK
5	La Trobe University |Bengaluru	Australia
6	University of Liverpool| Bengaluru	UK
7	Lancaster University | Bengaluru	UK
8	University of Western Australia |Chennai	Australia

Table 11: IBCs established beyond GIFT city and International EduCity

Scan this QR code to access a comprehensive PDF detailing the programs offered by international branch campuses within the above-selected hubs, including fee structures and levels of study.

7.5 Indian offshore campuses in other parts of the World

India has evolved not only as a host of TNE but also as an emerging provider. Both public and private HEIs from India have established offshore campuses across the global regions such as West Asia, Southeast Asia, and Africa. Section 11.7 and 11.8 of UGC Regulations on Institutions of Eminence Deemed to be Universities (Amendment) Regulations, 2021, outlines the provisions for setting up of off-shore campuses in two forms such as an education centre or a full-fledged campus. All the Institutions of Eminence should obtain approval from the UGC and the relevant statutory bodies based on the programs offered. Hence, these Indian HEIs must comply with both domestic jurisdiction and the host country's framework to ensure the effective establishment and functioning of their offshore campuses.

Till date, 13 Indian HEIs have set up their offshore campuses, including two IITs, with Savitribai Phule Pune University being the only state public university amongst them. Adding to this, IIT Madras has received requests from countries such as Sri Lanka and Nepal to establish campuses (IIT Madras, n.d.). These campuses offer programs ranging from bachelors to doctoral levels across disciplines such as STEM, Business, and humanities. The Table 12 below provides the list

of Indian HEIs with the location of their offshore campuses. Detailed information about the programs offered by these off-shore campuses is provided in the annexure.

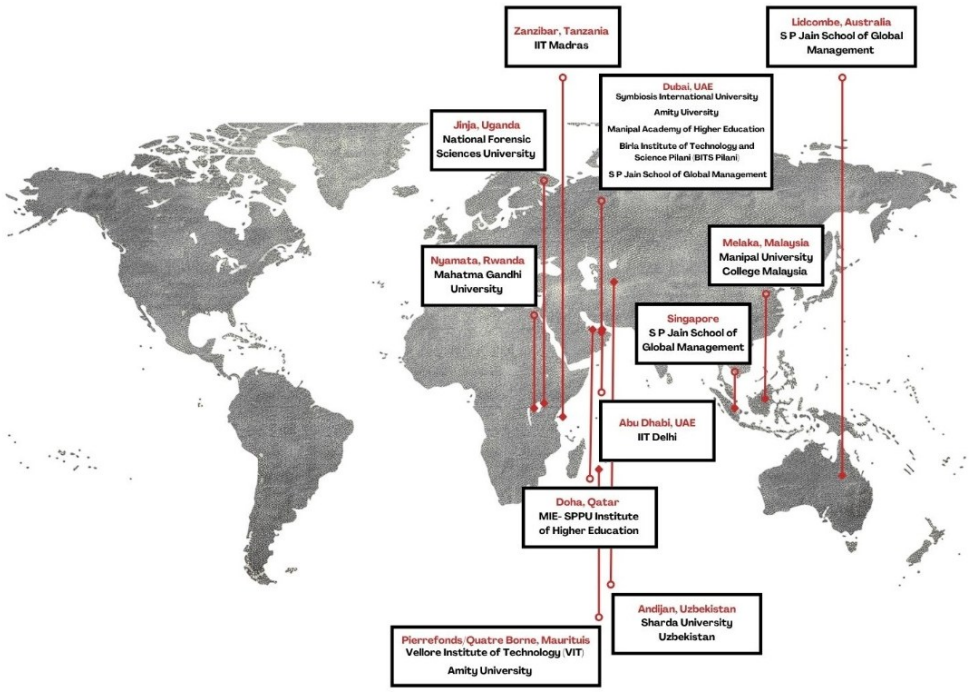

Figure 7 Indian Offshore Campuses

Sl No	Name of the Indian campuses abroad	Name of the host country
1	IIT Madras	Zanzibar, Tanzania
2	IIT Delhi	Abu Dhabi
3	Savitribai Phule Pune University, known as MIE- SPPU Institute of Higher Education	Doha, Qatar
4	Symbiosis International University	Dubai
5	Manipal Academy of Higher Education	Dubai (free zone)
6	Manipal University College Malaysia	Melaka, Malaysia
7	Amity University	Dubai, Mauritius
8	S P Jain School of Global Management	Dubai, Singapore and Australia
9	Birla Institute of Technology and Science Pilani (BITS Pilani)	Dubai
10	Vellore Institute of Technology (VIT)	Mauritius

11	Sharda University	Uzbekistan
12	National Forensic Sciences University	Uganda
13	Mahatma Gandhi University	Rwanda

Table 12: Indian offshore campuses abroad and their host countries

viii) Observations

Positioning India as a global higher education hub

The establishment of foreign campuses in GIFT IFSC and under the wider UGC route reflects India's growing ambition to position itself as a global higher education destination. This objective is closely tied to the wider internationalization agenda of NEP 2020, which seeks to expand internationalization at home, attract foreign institutions, and enable Indian students to acquire foreign qualifications without leaving the country. At the same time, this ambition should still be read as an emerging policy direction rather than a fully realized hub outcome. India is building the architecture of a global study destination, but that architecture remains in an early phase of implementation.

Emergence of Maharashtra as a hub for IHE

Recent developments in Navi Mumbai suggest that Maharashtra is becoming an important state-level node in India's international higher education landscape. The award of Letters of Intent to foreign universities for campuses in Mumbai/Navi Mumbai under the UGC 2023 Regulations, together with the development of the proposed International EduCity, indicates that Maharashtra is seeking to translate the internationalization agenda into a geographically concentrated institutional cluster.

Dependence on home-country quality assurance systems

India's current foreign-campus framework places substantial weight on the standing of institutions in their home jurisdictions. Under the IFSCA route, eligibility is tied to global ranking thresholds and the submission of the latest quality assurance audit report from a recognized agency in the home jurisdiction. Under the UGC route, the foreign institution must ensure that the quality of education offered in India is at par with that of the main campus, and it must also submit quality assurance and annual audit reports to the Commission. The architecture relies heavily on home-country reputation

and external quality validation, with Indian regulators exercising a supervisory rather than fully independent evaluative role.

Lack of multidisciplinary programs

The current program profile of foreign campuses in GIFT IFSC is notably narrow. This, however, can be observed as a direct consequence of the IFSCA framework, which permits courses in Financial Management, FinTech, Science, Technology, Engineering, and Mathematics. As a result, the GIFT pathway is strongly sectoral rather than broadly multidisciplinary. This sits in some tension with the spirit of NEP 2020, which envisages a higher education system in which institutions progressively move towards multidisciplinary forms by 2030. That said, this limitation applies more clearly to the IFSCA route than to the wider UGC framework, which is not similarly restricted by subject area.

Commercialization and NEP 2020

The entry of foreign campuses also introduces market-oriented features that require careful regulatory attention. NEP 2020 explicitly calls for strong mechanisms to curb the commercialization of higher education, emphasizing transparency and the not-for-profit character of educational institutions. At the same time, the foreign-campus frameworks permit a degree of financial flexibility that is meant to attract international providers. Under the UGC Regulations, foreign institutions may determine their own fee structure so long as it remains transparent and reasonable. In GIFT IFSC, the regulatory design is even more flexible, with official IFSCA material highlighting the absence of a regulatory tuition mandate and permitting fees in freely convertible foreign currency. These features do not automatically amount to commercialization in a negative sense, but they do create a tension between India's internationalization agenda and NEP's commitment to restraining market-driven excesses in higher education.

Ambiguity in recognition of qualification

A more precise concern arises not around the recognition of all foreign qualifications, but around the fit between certain program structures and India's evolving qualifications framework. The National Higher Education Qualifications Framework (NHEQF) and the UGC's postgraduate curriculum framework distinguish clearly between postgraduate pathways linked to three-year and four-year undergraduate degrees, including one-year and two-year master's formats. By contrast, some programs currently marketed in GIFT City, such as Deakin's 18-month master's programs, do not map neatly onto the durations explicitly named in these frameworks. This does not necessarily mean that such

qualifications will not be recognized, but it does suggest a need for clearer equivalence guidance so that program duration, credit expectations, and qualification level are interpreted consistently within the Indian context.

8. Comparative overview of the selected education hubs

The following table brings into one frame the major structural differences across the six education hubs examined in this report by comparing their governing authorities, quality-assurance arrangements, number of international branch campuses, source countries, programmatic focus, policy rationale, and the nature of state support. Read together, the table makes clear that education hubs do not follow a single institutional model. Rather, they represent distinct combinations of state strategy and developmental intent. India appears in the table as a dual-regulatory case, split between the IFSCA and UGC pathways, with a relatively large and still expanding IBC footprint and a strong emphasis on fintech, business, and STEM.

Another important insight from the table is that the rationale for hosting IBCs varies significantly across cases. In India and Qatar, the geopolitical dimension is especially visible, although it operates differently in each case: in India through strategic positioning within a changing global education order, and in Qatar through soft-power projection and state-led capacity building. Dubai combines economic and geopolitical objectives more explicitly, treating higher education as part of a broader talent-attraction and knowledge-economy agenda. Malaysia and Mauritius lean more clearly toward economic and developmental rationales, with affordability, regional access, and local capacity-building playing a stronger role. Singapore presents a blended case in which economic and geopolitical logics intersect through talent retention, skills alignment, and its ambition to remain a strategic node in the global knowledge economy. The table therefore shows that while all six hubs are linked to transnational education, the policy logic behind them is not uniform. Some are driven primarily by market expansion, some by state capacity and national transformation, and others by a mix of both.

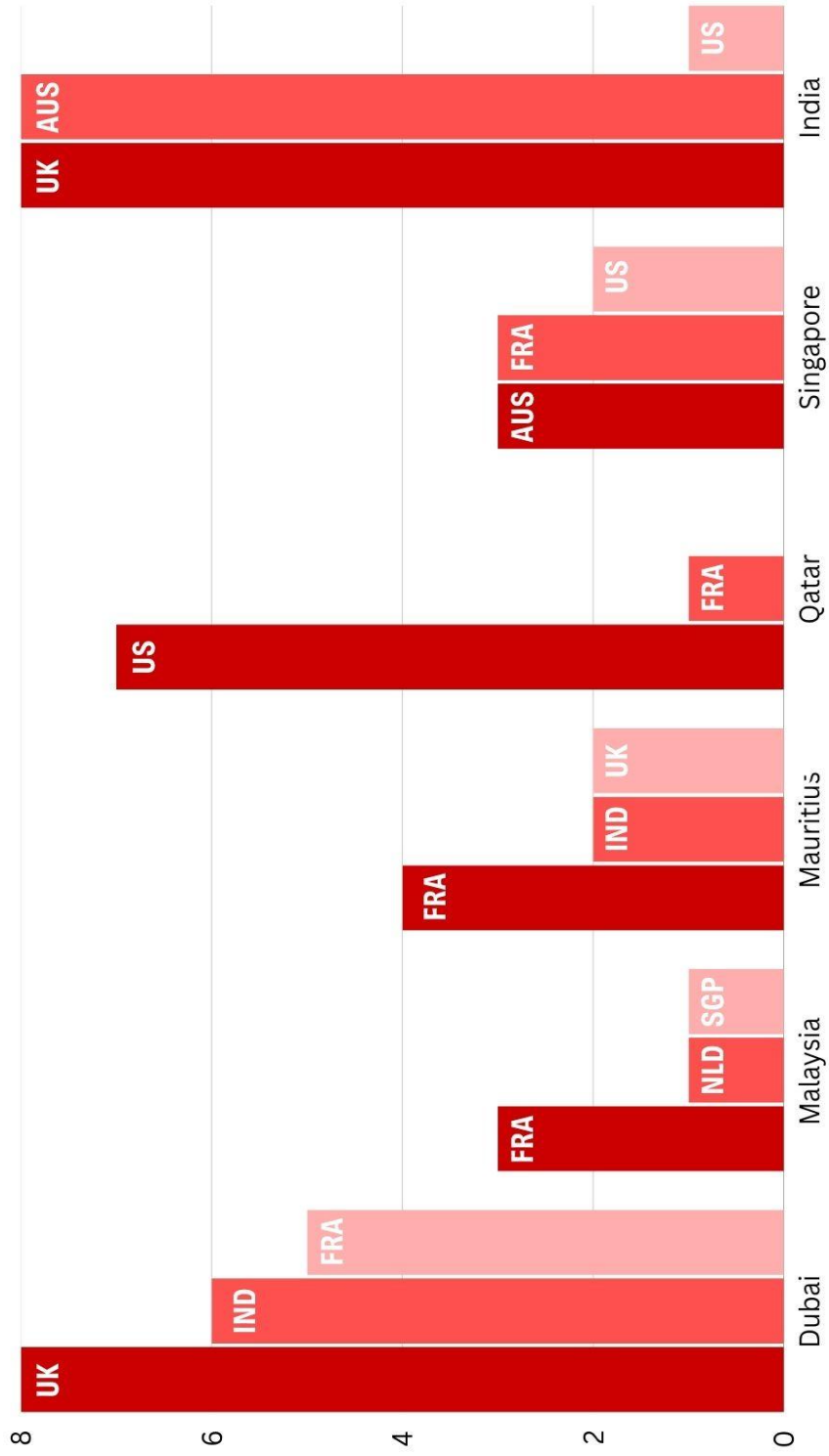

Figure 8: Predominant source countries establishing International Branch Campuses across the selected education hubs

Name of the Country	Governing Authority	Quality Assessment	No of IBCs	Countries of Origin	Programs Offered	Rationale	State support
Dubai	UAE MoE, CAA, UQAIB, TECOM	- KHDA academic authorization - UQAIB-type validation and CAA/MoE	39	Australia, China, France, Germany, India, Italy, Lebanon, Pakistan, Russia, Saudi Arabia, the United Kingdom, and the United States	Business, STEM, Health Sciences, Media, Law, Educational Studies, Arts	Economic and Geopolitical	Indirect support such as infrastructure, scholarships etc
Malaysia	Education@ ISkander SDN BHD and Johar State Government	- MQA	07	UK, Netherlands, Singapore	STEM, Management, Medicine	Economical	Partially funded by state
Mauritius	Medine group	- QAA; Mauritius Council of Registered Engineers; Mauritius Nursing council or Medical Council	10	India, US, France, UK	Management Engineering, STEM, Nursing	Economical	No state support
Qatar	QF and MOEHE	MSCHE and MOEHE	09	US	Engineering, STEM, Humanities	Geopolitical	Statephilanthrophic
Singapore	MTI/EDB; MOE; SSG; SkillsFuture Singapore	Two-tier model; ERF and EduTrust	10	Australia, France, Germany, India, and the United States.	STEM, Business, Finance,	Geopolitical and Economical	Direct and indirect support
India	IFSCA and UGC	Regulatory body from home jurisdiction	20	Australia, the UK, France, Italy, and the US	Fintech, Business, STEM	Geopolitical	Indirect support by tax concession

Table 1: Comparative overview of the selected education hubs

9. Key Observations

Based on the comparative study of the six education hubs examined in this report, the following key observations emerge. These observations do not seek to flatten the differences across cases, rather, they identify the broader patterns and structural tendencies that cut across the hubs despite their distinct policy models, ownership structures, regulatory designs, and developmental stages. Taken together, they help situate the discussion beyond individual case descriptions and draw attention to what these hubs collectively reveal about the possibilities and limitations of transnational education.

i) Concentration in STEM, Business, and Finance Disciplines

Across the hubs examined, academic provision remains strongly concentrated in STEM, business, and finance-related disciplines. This concentration is especially visible in hubs that have been designed around economic modernization, financial services, employability, and industry relevance. By contrast, the presence of the arts, humanities, and social sciences is either limited or uneven across several cases. While such concentration may reflect labour-market demand and policy priorities, it also narrows the intellectual profile of transnational education and raises questions about whether TNE is being developed primarily as a skills pipeline rather than as a broader academic project.

ii) Predominance of teaching over research

A second recurring pattern is the stronger emphasis on teaching and program delivery than on deep research institutionalization. In many cases, research and innovation appear in official narratives and long-term aspirations, but the actual institutional footprint remains more heavily oriented towards taught programs than towards doctoral training, post-doctoral activity, or sustained research ecosystems. This does not mean that research is absent, but it does suggest that many hubs continue to function primarily as teaching-led extensions of international higher education rather than as fully research-intensive academic environments.

iii) Limited local-contextualization

The hubs discussed provide access to international curricula, foreign degrees, and global institutional brands. Yet much of this provision still appears to be shaped by a consumption-

oriented model in which international education is imported for local uptake rather than deeply adapted to local realities. If TNE is to remain relevant in the longer term, it cannot operate only as a delivery mechanism for standardized foreign content. It must also become more responsive to local social, economic, and developmental contexts. Without stronger contextualization, the broader purpose of TNE remains limited, and its claims to innovation, transformation, or public value become harder to sustain.

iv) Growing role of private non-traditional actors in the expansion of TNE

The comparative cases also point to the growing participation of private developers, corporate actors, and non-traditional education players in the expansion of TNE. While transnational education has historically been led by higher education institutions, often with state support, several of the hubs studied here show that the landscape is widening. In Mauritius, the Uniciti model is privately developed, while in Malaysia, EduCity reflects a government-linked but commercially structured framework. The presence of FutureLearn within the Uniciti ecosystem further suggests that digital and platform-based actors are now entering spaces once dominated almost entirely by universities. TNE, in other words, is increasingly being shaped by a broader ecosystem of actors beyond the conventional universities alone.

v) Enrollment paradox and institutional expansion

The comparative picture also suggests that institutional expansion does not always translate into proportionate enrollment strength. Several hubs have grown in provider numbers or in symbolic visibility, yet this does not automatically mean that student demand has expanded at the same pace across all institutions. The safer conclusion is therefore not that there is uniform oversupply everywhere, but that there is often a tension between the visibility of institutional expansion and the depth of enrollment that it is able to sustain over time. This is especially important in smaller host systems and in highly competitive regional environments.

vi) Institutions exit risks and regulatory gaps

The long-term sustainability of international branch campuses remains a central concern. Although many institutions continue to operate successfully, cross-border campuses are not permanent by

default. The decision by Texas A&M University in 2024 to close its Qatar campus by 2028, citing heightened instability in the Middle East, notes the fragility that can affect even long-established arrangements. At the same time, the comparative cases show that student-protection and exit provisions are not equally visible or equally institutionalized across hubs. Some systems provide clearer continuity mechanisms than others. This means that exit risk must be treated not as an exceptional event, but as a structural issue within TNE governance.

vii) Reliance on global ranking as an entry requirement

Another notable pattern is the use of global rankings as an entry filter for foreign providers. In India, the UGC's 2023 Regulations require a foreign higher educational institution to be among the top 500 globally overall or in its subject area, while Dubai's recent higher education strategy also places visible emphasis on globally ranked providers and programs. The underlying logic is easy to understand, rankings serve as a shorthand for quality and international reputation. Yet this reliance also imports the weaknesses of ranking systems into TNE policy. Rankings remain contested for their dependence on reputation indicators and their uneven fit across disciplines and national contexts.

viii) Fee structures an affordability constraint

Although many branch campuses and hub-based institutions market themselves as more affordable alternatives to full study at the home campus, affordability remains relative rather than absolute. Lower cost does not necessarily mean broad accessibility. In several cases, tuition levels may still remain high for large segments of the domestic population, particularly when compared with public-sector or lower-cost private alternatives. TNE may therefore widen options without necessarily democratizing access in any meaningful socio-economic sense.

ix) Limited emphasis on socio-cultural engagement

The educational experience offered by many IBCs remains more academic than socio-culturally immersive. Students may gain access to international curricula and some degree of global academic exposure, but this does not automatically replicate the wider cultural immersion associated with studying abroad. As TNE expands, there remains scope to strengthen forms of socio-cultural

exchange and institutional engagement that go beyond the classroom and beyond credential acquisition alone.

x) Impact on domestic HEIs

The expansion of IBCs has undoubtedly broadened the range of higher education options available within host systems. At the same time, it may also intensify competition for domestic institutions, especially private providers operating in high-demand fields such as business, finance, and STEM. This competition may shape enrollment flows, fee-setting behaviour, program positioning, and student expectations. The implication is not that foreign campuses are inherently harmful to domestic institutions, but that their effects are relational and require careful regulatory balancing if local higher education ecosystems are to remain sustainable and competitive.

xi) Global North dominance in TNE

Lastly, the comparative cases reinforce the continuing dominance of institutions from the Global North within the TNE landscape. Providers from the United Kingdom, the United States, Australia, and parts of continental Europe continue to occupy the most visible positions in hub development across the Global South. This reproduces older asymmetries in the direction of knowledge flows and institutional prestige. Unless local priorities, local contexts, and reciprocal forms of collaboration are more deeply embedded, TNE risks reproducing global hierarchies rather than meaningfully transforming them.

xii) The conflicts of regulatory bodies

Apart from the competition between universities, the struggle for power between regulatory bodies may also replicate the global dominance of the powerful. The differences between the home country control and the host country oversight and regional expectation (as in case of ASEAN) may complicate the operations for higher educations institutions with global aspirations.

10. Discussion

The expansion of TNE is closely linked to broader geopolitical and economic changes. The rise of right-wing populism led to restrictive immigration policies targeting international students, has placed

financial pressure on universities, particularly in case of the UK, that rely on international enrollments. As an effect, many HEIs have adopted offshore campus models as a strategy to sustain revenue while navigating domestic political constraints. This trend reflects the growing commercialization of higher education.

The global distribution of TNE providers reveals important differences in their motivation in setting up branch campuses abroad. We can observe that only a limited number of European universities have established campuses abroad, largely because they remain substantially state-funded. In contrast, cases such as Mauritius demonstrate the presence of French universities driven more by political and diplomatic intents. On the other hand, universities from the UK, Australia and the United States are primarily motivated by economic objectives.

With regard to India, the growing emphasis on TNE is shaped by both domestic demand and global positioning. India's large expanding youth population, coupled with increasing demand for quality international education, has led to policy efforts to attract HEIs into the country. The emerging trajectory of TNE in India is likely to have implications for its stakeholders at three levels, namely;

1. **Individual Level:** At the individual level, the impact is most evident for students and faculty members. Although fee at FHEIs in India are lower than studying abroad, they remain significantly higher, often several times more than those charged by domestic institutions, raising concerns about equitable access across socio-economic groups. For faculty members, however, the entry of FHEIs presents attractive opportunities, including higher remuneration, improved research prospects, and enhanced career mobility, particularly for highly qualified and early-career academics.

2. **Institutional Level:** At the institutional level, the effects are likely to be uneven. Public HEIs in India may remain relatively unaffected due to continued state support. In contrast, private institutions are expected to face heightened competition. This may lead to increased expenditure on faculty retention, as institutions are compelled to offer more competitive salaries. Simultaneously, competitive pressures may result in downward pressure on program fee, thus affecting revenue models and financial sustainability of private universities.

3. **Systemic Level:** At the systemic level, increased competition and possible fee adjustments across institutions could improve access and contribute to higher enrollment. Yet such

changes may also trigger wider ripple effects across the higher education ecosystem. A reduction in fees at higher-tier private institutions may make them newly accessible to students who previously could not afford them, thereby shifting demand away from mid-tier institutions. In turn, students who might earlier have entered mid-tier institutions may move towards lower-cost options such as community colleges or regional colleges, setting off a cascading realignment across different tiers of the system. While this may broaden access in aggregate terms, it may also alter institutional balance and financial viability across the sector. At the same time, the scale of such systemic effects will depend on whether foreign campuses are able to attract sufficient student demand. If enrollments remain limited, their wider impact may also remain constrained.

Taken together, these dynamics suggest that the expansion of TNE in India should not be understood simply as an additive increase in educational choice. It has the potential to transform faculty talent pool, alter patterns of student demand, intensify competition across institutional tiers, and deepen existing questions around affordability and access. The central issue, therefore, is not whether transnational education will expand in India, but under what regulatory conditions, at what scale, and with what consequences for different stakeholders within the system.

At a broader level, the comparative analysis in this Report shows that transnational education is neither a uniform solution nor a self-evident marker of progress. Its effects depend on the regulatory architecture within which it is embedded, the ownership structure that sustains it, the disciplines it prioritizes, the extent of its affordability, and the degree to which it is made responsive to local developmental needs. For India, the challenge is to ensure that the expansion of TNE strengthens domestic capacity, widens meaningful access, and contributes to long-term institutional development rather than merely importing global brands. Read in this light, education hubs are not simply sites of foreign institutional presence, they are tests of how a country negotiates the relationship between global aspiration and national educational purpose.

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